DOCUMENT RESUME

ED 437 877 HE 032 749

TITLE	EDExpress, 2000-2001: Application Processing.
INSTITUTION	Office of Student Financial Assistance (ED), Washington, DC.
PUB DATE	2000-03-00
NOTE	330p.
AVAILABLE FROM	ED Pubs, P.O. Box 1398, Jessup, MD 20794-1398. Tel: 877-433-7827 (Toll Free).
PUB TYPE	Guides - Non-Classroom (055)
EDRS PRICE	MF01/PC14 Plus Postage.
DESCRIPTORS	Educational Finance; *Eligibility; Federal Aid; Federal Programs; *Financial Aid Applicants; Higher Education; *Need Analysis (Student Financial Aid); Needs Assessment; Paying for College; *Student Financial Aid; Student Financial Aid Officers; Student Loan Programs
IDENTIFIERS	*Free Application for Federal Student Aid; Institutional Student Information Records

ABSTRACT

This trainee workbook, to accompany a one-day workshop at the Student Financial Assistance (SFA) University, is intended for individuals who are processing student financial aid applications using electronic methods such as EDExpress (Electronic Data Exchange) or FAFSA (Free Application for Federal Student Aid) Express. The first section of the workbook is an overview and covers various implementation issues for using EDE. The next two sections cover the six-step process (entering data, exporting data, transmitting data, processing data, receiving data, and importing data) for managing applications and for working with ISIRs (institutional student information records). The final section is a review in order to apply what has been learned. Appendices include a unit on using queries to select or filter data, additional exercise material, an explanation of various toolbars on the EDExpress screens, and a section on print reports. The workbook material is extensively illustrated with samples of aid forms and typical computer entries. (CH)

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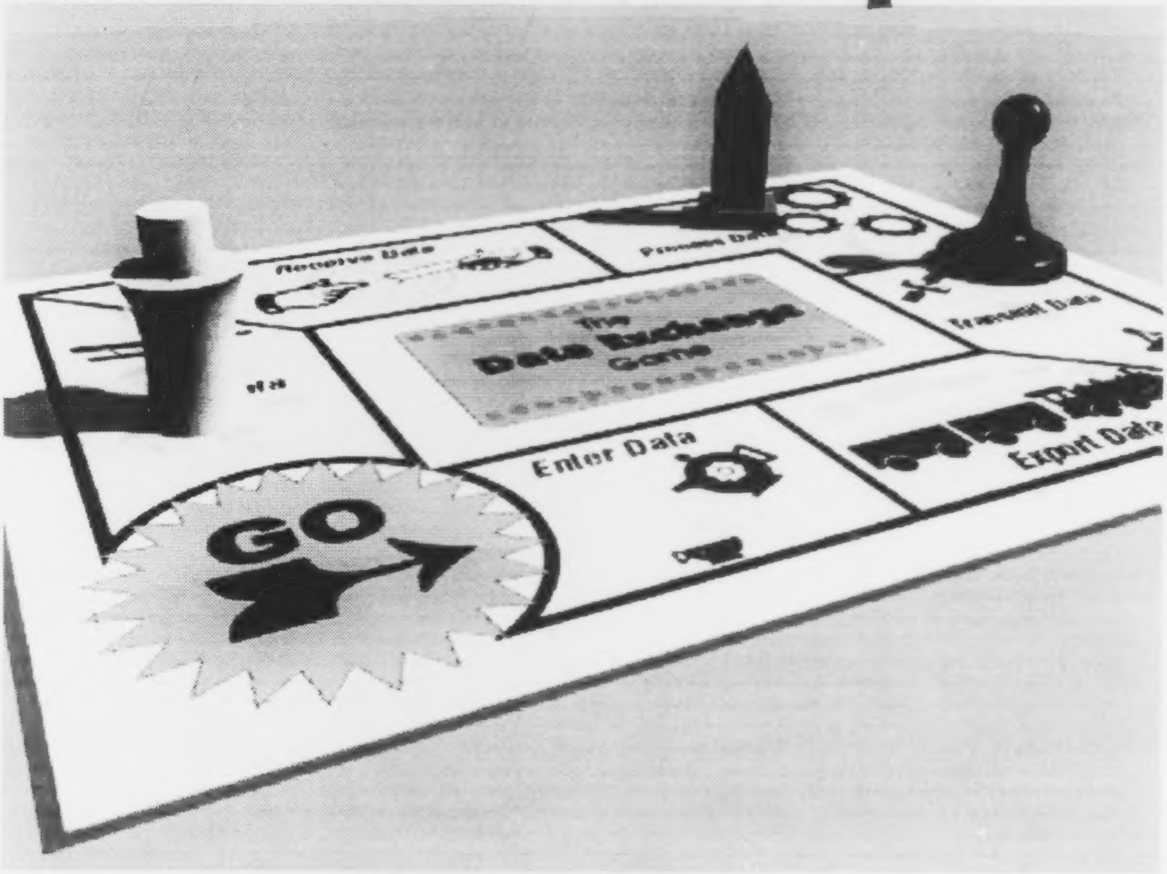
HE

ED 437 877

2000-2001 EDExpress


Receive Data
Process Data
Transmit Data
The Data Exchange Game
Enter Data
Export Data
GO

Application Processing

HE 032 749

SFA
UNIVERSITY
STUDENT FINANCIAL ASSISTANCE

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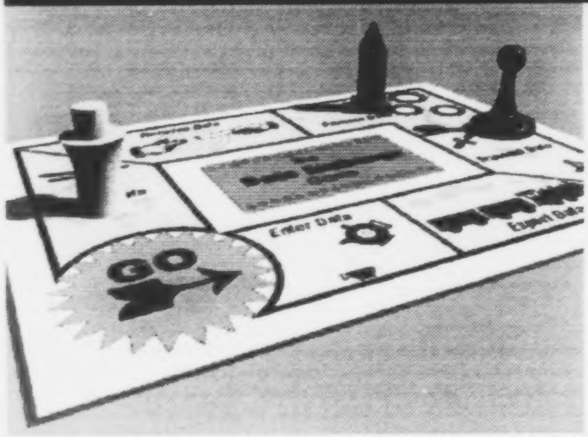
Unit 1


Enter Data
Export Data
GO

EDE Overview

Objectives

1. Define terms for processing financial aid applications using Electronic Data Exchange (EDE).
2. Define the six-step process for sending and receiving data using EDE.
3. Describe good practices for setting up and implementing EDE at your institution.

Unit 1 - EDE Overview Exercise

This group exercise is intended to start you thinking about the six-step Electronic Data Exchange process, and prepare you for the instruction you will receive today. The six steps involved in the process are the foundation for the course material, so it is important to introduce them up front. Before we get started, we want to see if you can put the six steps in order based on your knowledge of and experience with financial aid.

So, here's how it works:

1. Your instructor will divide the class into groups.

2. Each group will be given a set of six cards.

3. You will have 5 minutes to discuss the information on the card, and then complete two tasks:

Match the definitions to the steps, and

Put the steps in the correct order.

Base the order on a logical sequence if you follow certain data, for example an application, through the process from start to finish. (we know some of these steps "overlap" in the real world!)

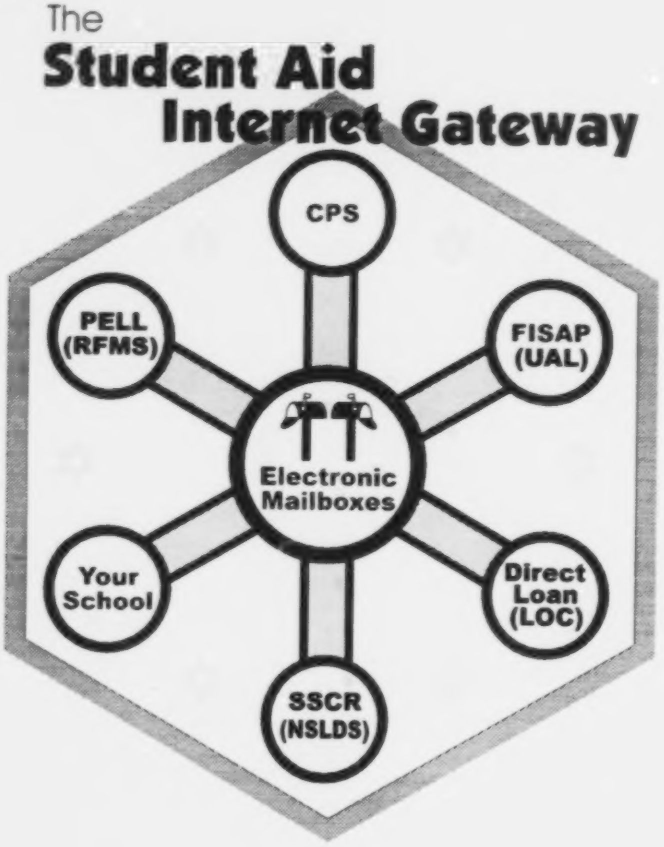
4. When the time is up, your instructor will explain the rest of the activity!

Thanks for your participation in the exercise!

5

What is EDE?

Electronic Data Exchange (EDE) allows schools to send and receive Title IV student financial aid application data to and from the U.S. Department of Education's (ED's) data processors. Originally, EDE included only an exchange of data with the Central Processing System (CPS) for electronic applications and electronic Student Aid Reports (SARs). EDE has since expanded to encompass all types of data schools send to ED, such as Direct Loan, Pell Payment, and NSLDS.



How Is Data Exchanged?

Participants in EDE use the Student Aid Internet Gateway to exchange data with ED data processing service providers. The Student Aid Internet Gateway (SAIG) is a store and forward communication network that carries data to and from the SAIG databases.

EDE participants transmit data as needed to the SAIG, where it is stored in a network mailbox. Each of the data processing providers (CPS, NSLDS, etc.) retrieve data from the mailboxes daily. Once the records are processed, they are placed back in the mailbox for you to retrieve.

Note: For more information on Student Aid Internet Gateway participation, refer to the Electronic Access Guide. The EAG has detailed information on the enrollment process, the software that you receive with the enrollment, and the supporting documentation.

The 6-Step EDE Process

The Electronic Data Exchange process has six steps:

1. Enter Data

Creating and saving any type of record using the EDExpress software or your own data entry software.

2. Export Data

Creating a batch of export records using either EDExpress or your own software.

3. Transmit Data

Using Edconn32 (transmission software) to access the SAIG and send the data to a mailbox.

4. Process Data

The data is processed by the appropriate data provider and the processed information is returned to your mailbox.

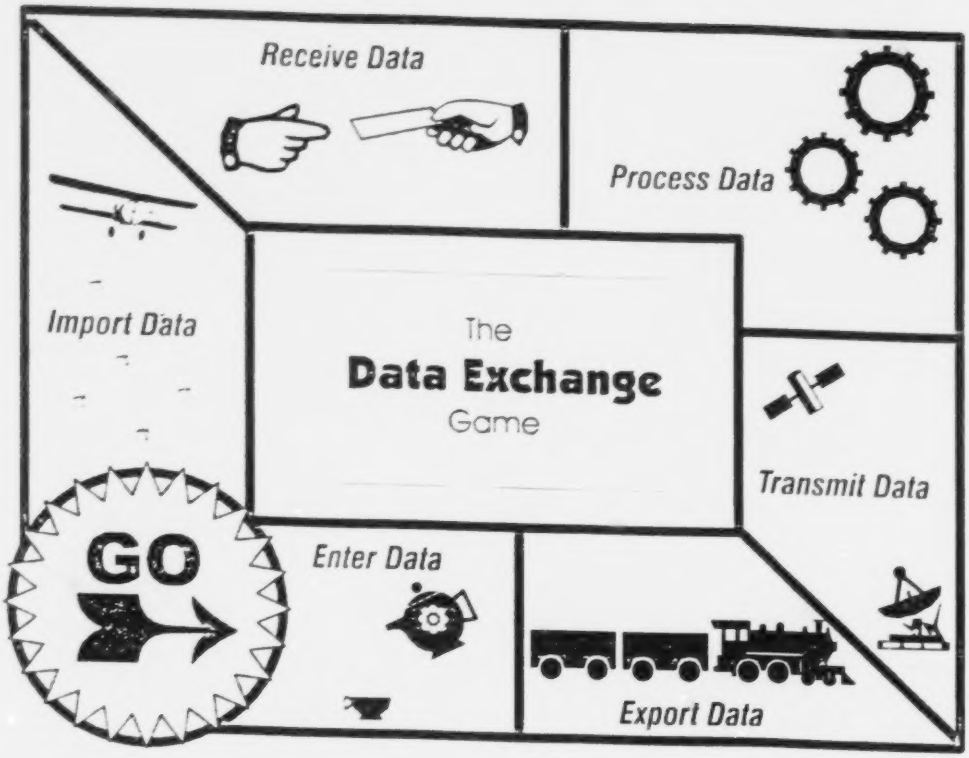
5. Receive Data

Using Edconn32 (transmission software) to send an electronic request to the SAIG to receive processed data.

6. Import Data

Importing records stored in batches on your PC into EDExpress or your own software package.

The 6-Step EDE Process


Receive Data
Process Data
Import Data
The
Data Exchange
Game
Transmit Data
GO
Enter Data
Export Data

8

A Plan for Getting Started with EDE

As a participant in EDE, you must consider many implementation issues. Questions you will need to ask yourself include:

- Will new procedures affect the roles and responsibilities of your staff?
- Will you need to obtain approval to participate from institutional management?
- Do you have the equipment and technical support needed to process data electronically?

One ongoing consideration with EDE is how you have your computer system configured.

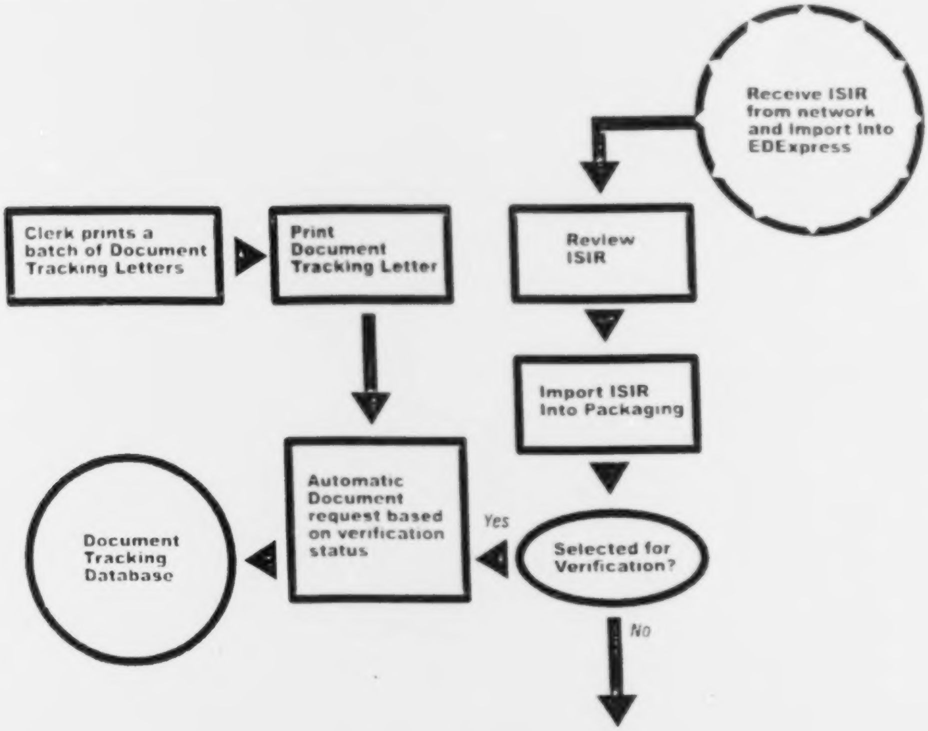
- Do you have a stand-alone PC or local area network (LAN)?
- Do you have a combination of PCs and mainframe?
- Do you have mainframes in combination with other client/server configurations?

The best part of using EDE is the flexibility you have in setting up your configuration and selecting the processes that work best with your institution's existing computer system.

Listed below are several major considerations in evaluating the migration of your processing operation to one that uses EDE:

1. Establish Desired New Procedures

Write down a process flow to include all of the functions performed in your office. This may become part of your general procedures manual.


Receive ISIR from network and Import into EDExpress
Clerk prints a batch of Document Tracking Letters
Print Document Tracking Letter
Review ISIR
Import ISIR Into Packaging
Automatic Document request based on verification status
Document Tracking Database
Yes
Selected for Verification?
No

2. Create a Processing Schedule

Create a processing schedule to track all of your daily activities.

Monday	**Tuesday**	**Wednesday**
Enter Applications	**Enter Corrections**	**Enter Pell Payment Data**
*	**Retrieve ISIRs**	**Retrieve Application ISIRs**
*	*	*

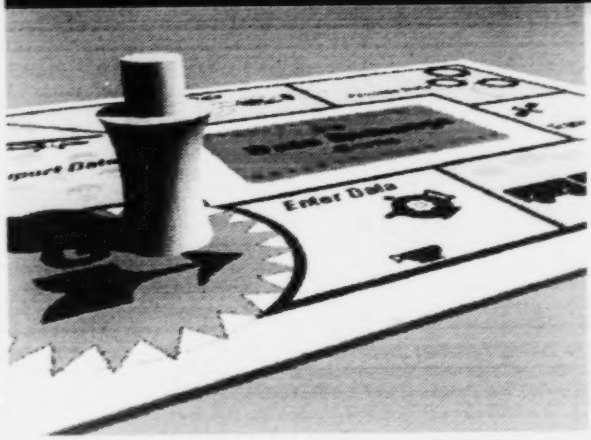
3. Create a Sample Data Processing Log

Creating a data processing log will help track records through the process. The log will clearly show where records are in the process and where they will go next.

EDExpress		**EDconnect**				**EDExpress**	
Batch ID#	Export File Name [Message Class] (Date)	File Transmitted (Initials) ✓	Date Sent	Received File Name [Message Class] (Date)	Date Rec'd.	File Imported (Initials) ✓	Date Imported

10

Unit 2


Enter Data
Input Data

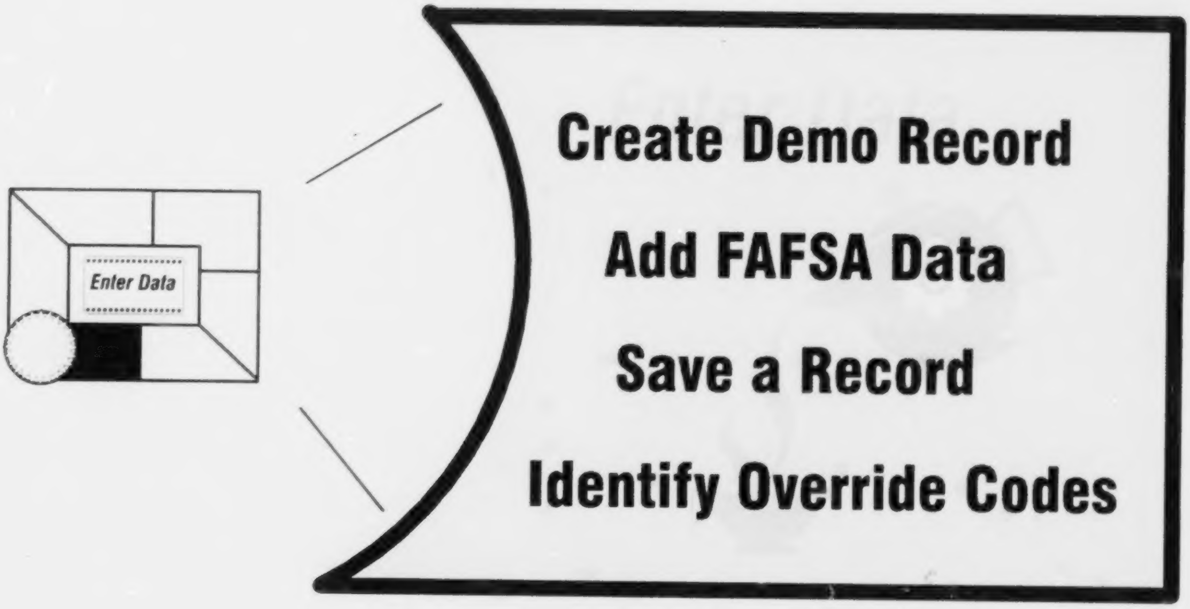
Managing Applications

Lesson 1 – Entering Application Data

Objectives

At the end of this lesson you should be able to:

1. Identify the three electronic application entry methods and their uses.
2. Create a new application, calculate an estimated EFC, and calculate taxes paid.
3. Save a new record.
4. Identify the use of override codes.



Create Demo Record

Add FAFSA Data

Save a Record

Identify Override Codes

Three Alternatives to Paper

Currently, there are three methods of creating an initial application, all of which are superior to using paper:

- FAFSA on the Web/Renewal FAFSA on the Web
- FAFSA Express
- EDExpress

All three electronic methods provide several advantages:

- Complete data entry at point of entry. The student or official must fill in all fields necessary for processing before sending data to the CPS.
- The data is edited for valid field content before being sent to CPS.
- Built-in edits significantly reduce the reject rate.
- End of entry edits ensure data consistency.
- Faster processing time than the paper FAFSA.

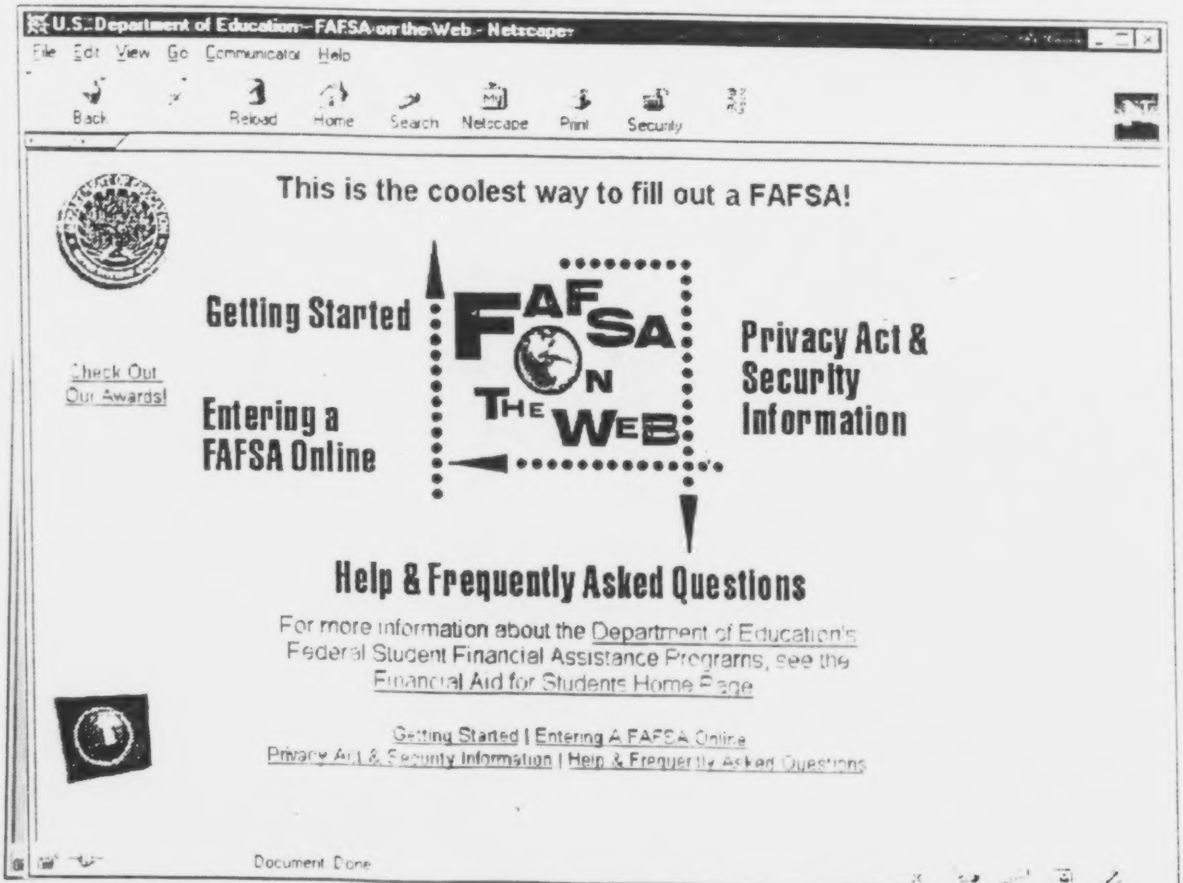
FAFSA on the Web (www.fafsa.ed.gov)

Benefits

- Students and parents can use PINs to sign the FAFSA on the Web. NEW!
- On-line instructions and help are easy to use and are more detailed than those on the paper FAFSA.
- There are no record retention requirements for the school.
- Anyone with Internet access can apply for financial aid.
- Data reaches the CPS quickly.
- For renewal FAFSA on the Web, the previous year's data is already provided.
- Renewal FAFSA does not require a signature page from the student.
- Can save partial or full record to a disk.

Considerations

- First time FAFSA on the Web filers must have a printer to print the signature page.
- Verify compatability of Internet Browser version.


U.S. Department of Education—FAFSA on the Web - Netscape
File Edit View Go Communicator Help
Back
Reload
Home
Search
Netscape
Print
Security
Check Out Our Awards!
Document: Done

This is the coolest way to fill out a FAFSA!

Getting Started

Entering a FAFSA Online

FAFSA ON THE WEB

Privacy Act & Security Information

Help & Frequently Asked Questions

For more information about the Department of Education's Federal Student Financial Assistance Programs, see the Financial Aid for Students Home Page

Getting Started | Entering A FAFSA Online
Privacy Act & Security Information | Help & Frequently Asked Questions

FAFSA Express

Benefits

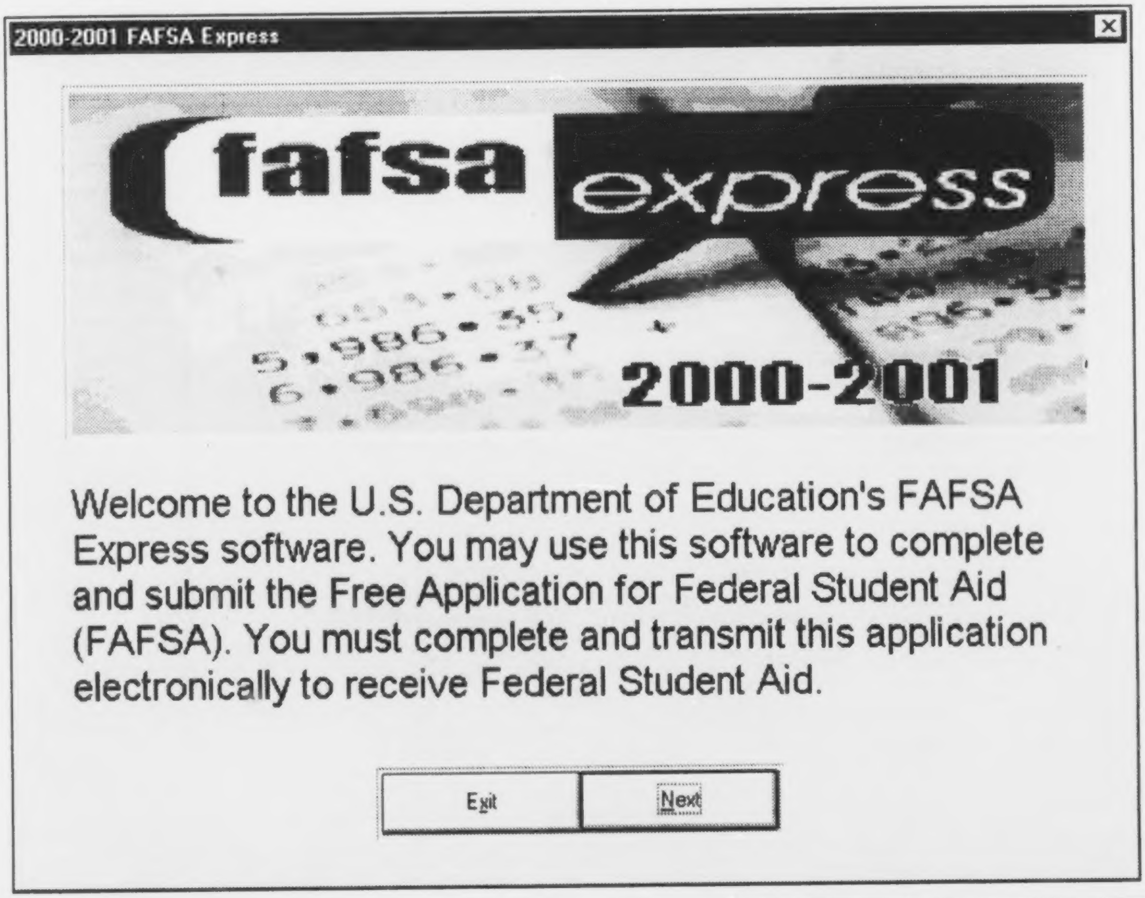
- The student may enter data from home or from any PC that has a modem.
- Can save partial or full record to a disk.

Considerations

- To use FAFSA Express from home, a student must download the software from the Department of Education's web site.
- Since FAFSA Express requires most students to print and submit a signature page, a printer is necessary for quick turnaround.

How to get FAFSA Express

- Call CPS Customer Service at 800/801-0576
- Download from the Department of Education's Web site at **www.ed.gov/offices/OPE/express.html.**



Welcome to the U.S. Department of Education's FAFSA Express software. You may use this software to complete and submit the Free Application for Federal Student Aid (FAFSA). You must complete and transmit this application electronically to receive Federal Student Aid.

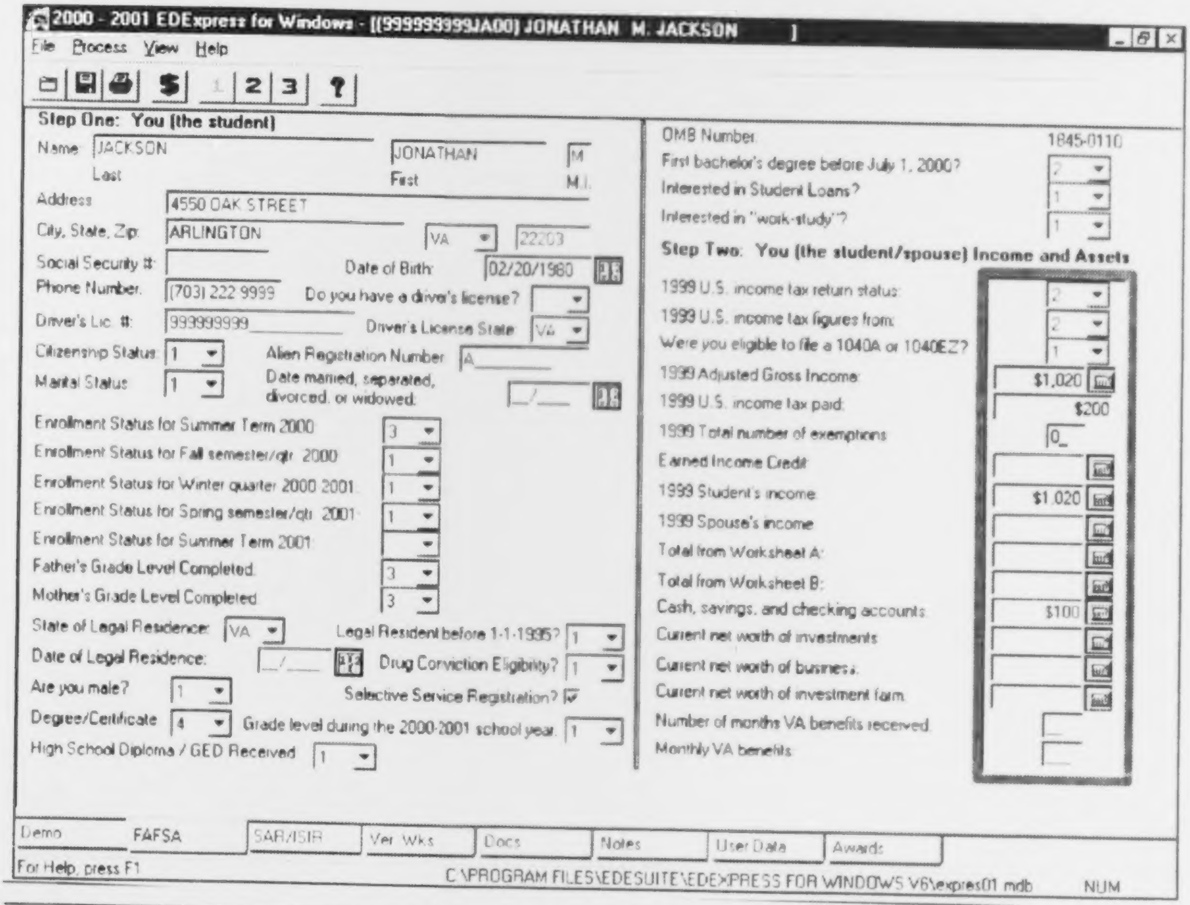
EDExpress

Benefits

- FAA personnel can set reject, dependency, and assumption override codes.
- FAA personnel can calculate the estimated EFC and taxes paid.
- FAA personnel can easily manage entered data.
- Since the school retains the signature page, the FAFSAs are sent to the CPS and processed quickly.
- Expert entry reduces the need for ISIR corrections.

Considerations

- Schools need to set aside time and/or staff for data entry.
- Schools should establish a process for maintaining application records; the original signature FAFSA must be kept by the school.
- FAA personnel should have a completed FAFSA before beginning entry.



2000 - 2001 EDExpress for Windows - [(999999999JA00) JONATHAN M. JACKSON]

Step One: You (the student)

Name: JACKSON (Last) JONATHAN (First) M (M.I.)
Address: 4550 OAK STREET
City, State, Zip: ARLINGTON VA 22203
Social Security #:
Date of Birth: 02/20/1980
Phone Number: (703) 222 9999
Do you have a driver's license?
Driver's Lic. #: 999999999
Driver's License State: VA
Citizenship Status: 1
Alien Registration Number: A
Marital Status: 1
Date married, separated, divorced, or widowed: __/____
Enrollment Status for Summer Term 2000: 3
Enrollment Status for Fall semester/qtr. 2000: 1
Enrollment Status for Winter quarter 2000-2001: 1
Enrollment Status for Spring semester/qtr. 2001: 1
Enrollment Status for Summer Term 2001:
Father's Grade Level Completed: 3
Mother's Grade Level Completed: 3
State of Legal Residence: VA
Legal Resident before 1-1-1995? 1
Date of Legal Residence: __/____
Drug Conviction Eligibility? 1
Are you male? 1
Selective Service Registration? ☑
Degree/Certificate: 4
Grade level during the 2000-2001 school year: 1
High School Diploma / GED Received: 1

OMB Number: 1845-0110
First bachelor's degree before July 1, 2000? 2
Interested in Student Loans? 1
Interested in "work-study"? 1

Step Two: You (the student/spouse) Income and Assets

1999 U.S. income tax return status: 2
1999 U.S. income tax figures from: 2
Were you eligible to file a 1040A or 1040EZ? 1
1999 Adjusted Gross Income: $1,020
1999 U.S. income tax paid: $200
1999 Total number of exemptions: 0
Earned Income Credit:
1999 Student's income: $1,020
1999 Spouse's income:
Total from Worksheet A:
Total from Worksheet B:
Cash, savings, and checking accounts: $100
Current net worth of investments:
Current net worth of business:
Current net worth of investment farm:
Number of months VA benefits received:
Monthly VA benefits:

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Creating a New Application in EDExpress

One student may have several different types of records in EDExpress. All of these records are connected to a single demographic record. EDExpress uses this information as the default data for records that require duplicate information (i.e. the student's name and social security number). The layout of the questions in EDExpress mirrors the paper FAFSA.

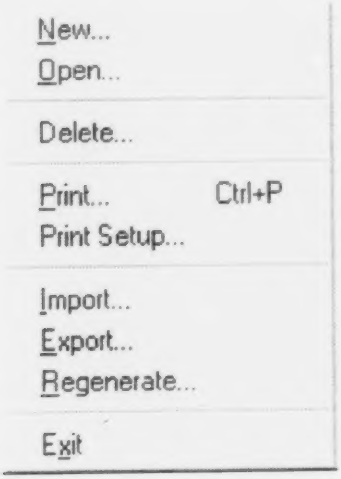
Tip: A complete demographic record provides a basis for creating subsequent records more accurately and quickly.

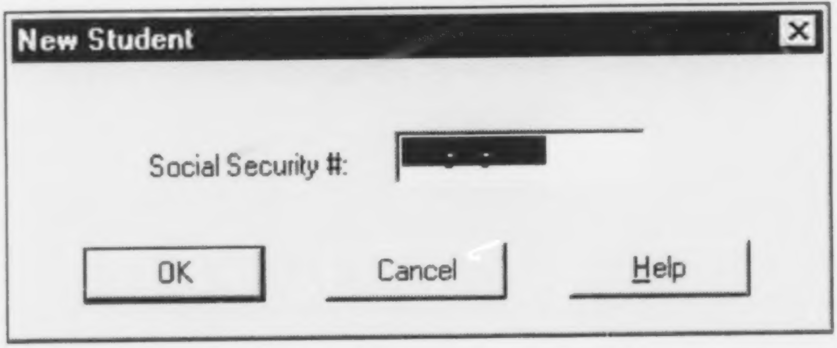
To enter a new FAFSA application:

*Select **File/New** from the menu bar.*

Type the student's Social Security Number in the text entry box.

*Click **OK** or press **Enter**.*


New...
Open...
Delete...
Print... Ctrl+P
Print Setup...
Import...
Export...
Regenerate...
Exit


New Student
Social Security #:
OK
Cancel
Help

Demo Record

Enter the student's demographic data in the appropriate fields.

*Select **File/Save** to save the demographic record.*

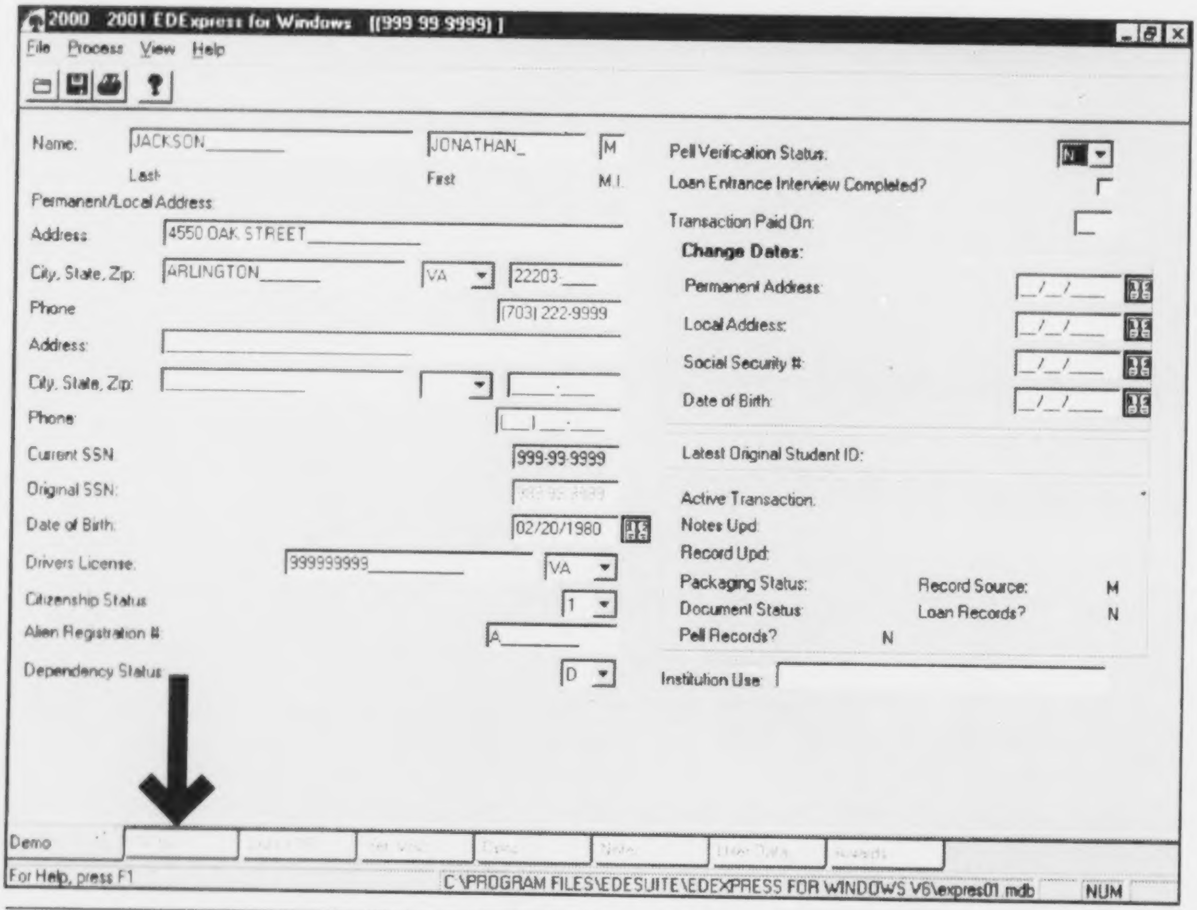
*Click on the **FAFSA** tab to open the new FAFSA record for this student.*

The demographic record is the default screen that appears each time you open a student record. To create and save a demo record, you must only enter the last name or first name and current SSN.

Tip: Required entry fields on the FAFSA are yellow. Student data areas are outlined in pink. Parental data areas are outlined in purple.

The tabs at the bottom of the screen, Demo, FAFSA, ISIR/SAR, etc., help you navigate through all EDExpress functions for student records.

Tip: Use F1 for value help.



2000 2001 EDExpress for Windows [(999 99 9999)]

Name: JACKSON (Last) JONATHAN (First) M (M.I.)
Permanent/Local Address:
Address: 4550 OAK STREET
City, State, Zip: ARLINGTON VA 22203
Phone: (703) 222-9999
Address:
City, State, Zip:
Phone:
Current SSN: 999-99-9999
Original SSN: 999-99-9999
Date of Birth: 02/20/1980
Drivers License: 999999999 VA
Citizenship Status: 1
Alien Registration #: A
Dependency Status: D

Pell Verification Status: N
Loan Entrance Interview Completed? ☐
Transaction Paid On:
Change Dates:
Permanent Address: _/_/___
Local Address: _/_/___
Social Security #: _/_/___
Date of Birth: _/_/___
Latest Original Student ID:
Active Transaction:
Notes Upd:
Record Upd:
Packaging Status:
Record Source: M
Document Status:
Loan Records? N
Pell Records? N
Institution Use:

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

BEST COPY AVAILABLE

Entry Screen 1

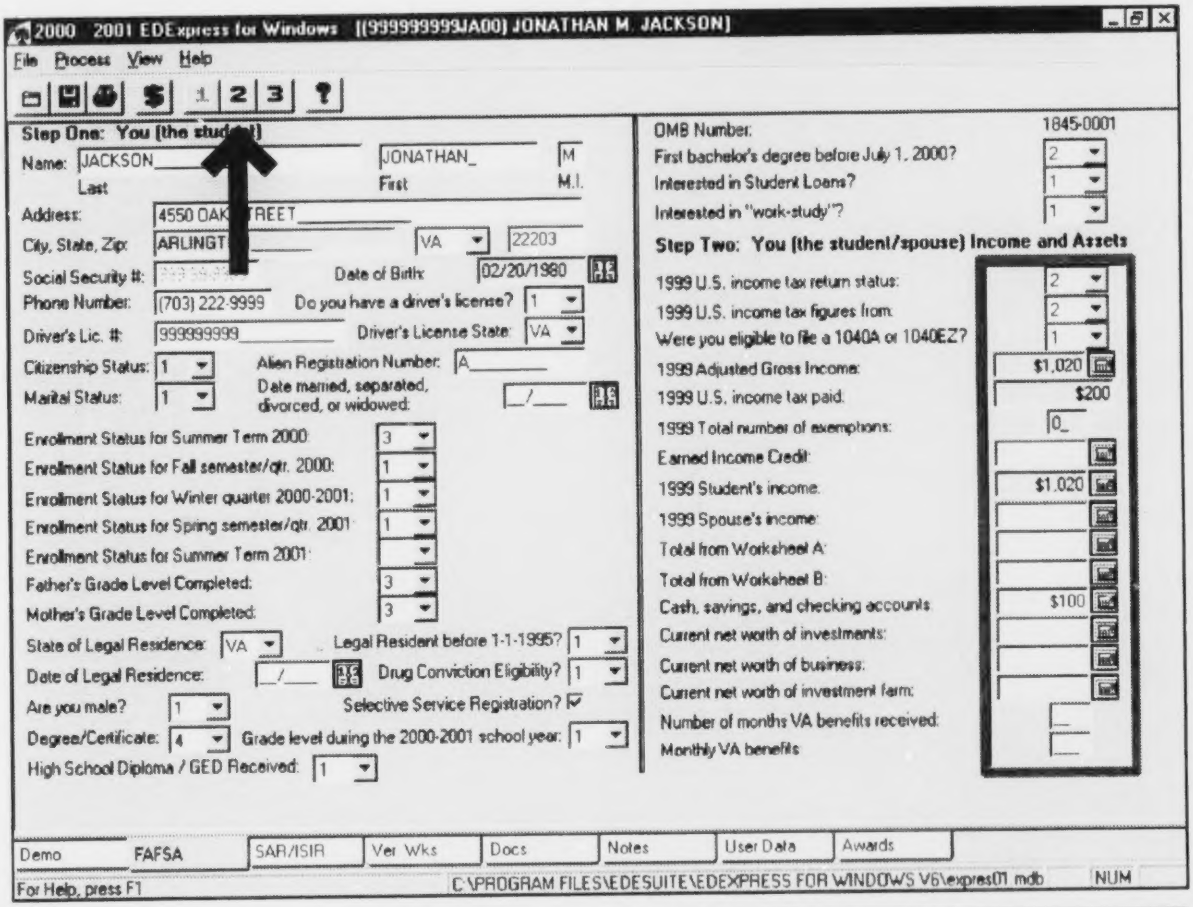
Screen 1 includes questions from the FAFSA Step 1 and Step 2.

NEW! **Entering a driver's license number and state updates the "Do you have a driver's license?" field on the FAFSA page 1.**

Type the application data in the appropriate field.

*Press **Tab** to move forward from field to field; press **Shift-Tab** to move in reverse; or use your mouse to click directly on the field.*

*To move to the next FAFSA screen, click the button numbered **2** on the toolbar.*



2000 2001 EDExpress for Windows [(999999999JA00) JONATHAN M. JACKSON]

Step One: You (the stud

Name: JACKSON_ (Last) JONATHAN_ (First) M (M.I.)
Address: 4550 OAK TREET_
City, State, Zip: ARLINGT_ VA 22203
Social Security #: [illegible]
Date of Birth: 02/20/1980
Phone Number: (703) 222-9999
Do you have a driver's license?: 1
Driver's Lic. #: 999999999_
Driver's License State: VA
Citizenship Status: 1
Alien Registration Number: A_
Marital Status: 1
Date married, separated, divorced, or widowed: __/__
Enrollment Status for Summer Term 2000: 3
Enrollment Status for Fall semester/qtr. 2000: 1
Enrollment Status for Winter quarter 2000-2001: 1
Enrollment Status for Spring semester/qtr. 2001: 1
Enrollment Status for Summer Term 2001:
Father's Grade Level Completed: 3
Mother's Grade Level Completed: 3
State of Legal Residence: VA
Legal Resident before 1-1-1995?: 1
Date of Legal Residence: __/__
Drug Conviction Eligibility?: 1
Are you male?: 1
Selective Service Registration? ☑
Degree/Certificate: 4
Grade level during the 2000-2001 school year: 1
High School Diploma / GED Received: 1

OMB Number: 1845-0001
First bachelor's degree before July 1, 2000?: 2
Interested in Student Loans?: 1
Interested in "work-study"?: 1

Step Two: You (the student/spouse) Income and Assets

1999 U.S. income tax return status: 2
1999 U.S. income tax figures from: 2
Were you eligible to file a 1040A or 1040EZ?: 1
1999 Adjusted Gross Income: $1,020
1999 U.S. income tax paid: $200
1999 Total number of exemptions: 0_
Earned Income Credit:
1999 Student's income: $1,020
1999 Spouse's income:
Total from Worksheet A:
Total from Worksheet B:
Cash, savings, and checking accounts: $100
Current net worth of investments:
Current net worth of business:
Current net worth of investment farm:
Number of months VA benefits received: __
Monthly VA benefits: __

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Entry Screen 2

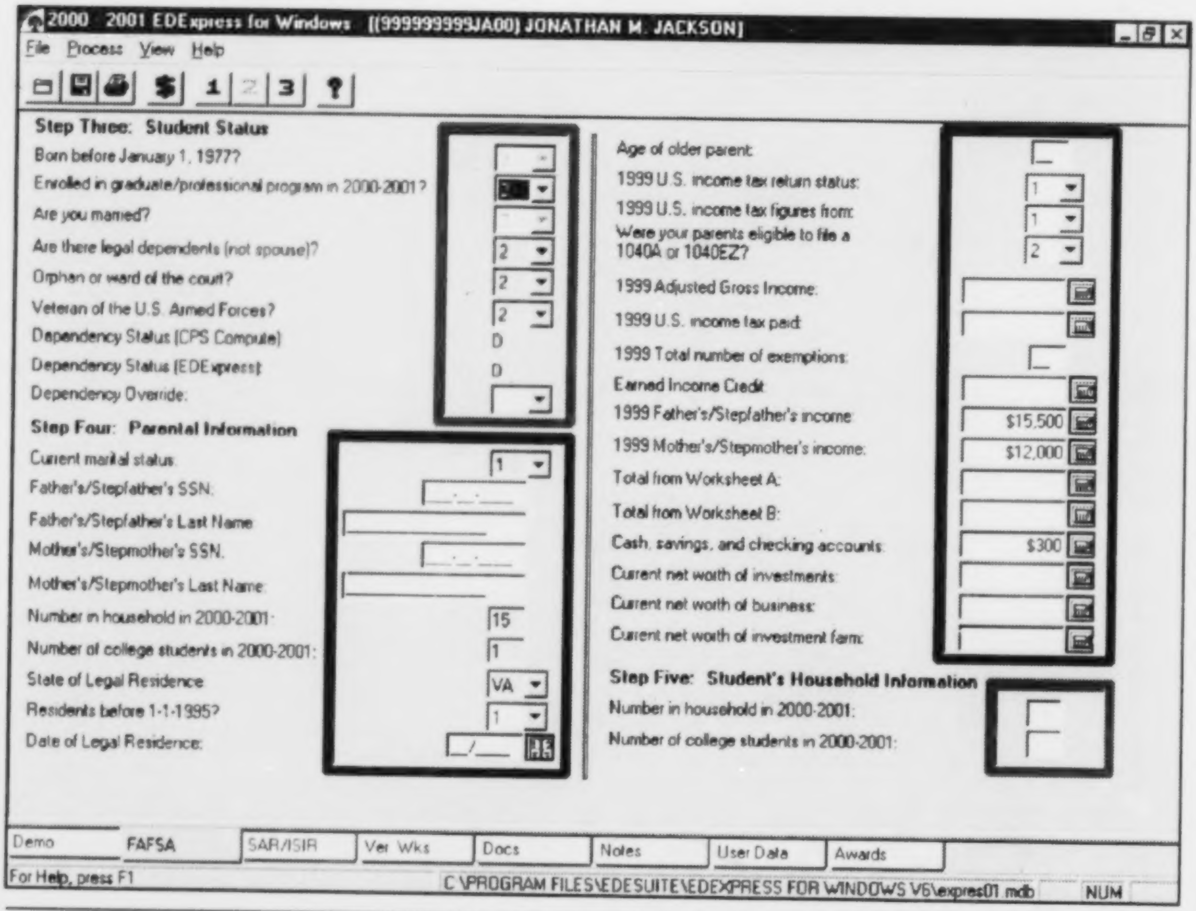
Enter parental data (outlined in purple) for dependent students. (You can enter parental data for independent students if needed for certain programs.)

Screen 2 includes FAFSA Steps 3,4 and 5.

EDExpress edits for valid and required data before allowing you to proceed to the next page. If invalid data is entered, you will receive an invalid entry message. When you click **OK**, the cursor will be on the first field that has a problem.

Note: Click on the ***User Data*** *tab at any time to view or update the user-defined fields.*

Tip: Press ***F1*** *for help to see valid and required data entries.*


2000 2001 EDExpress for Windows [(999999999JA00) JONATHAN M. JACKSON]
File
Process
View
Help
1
2
3
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Step Three: Student Status

Born before January 1, 1977?
Enrolled in graduate/professional program in 2000-2001?
Are you married?
Are there legal dependents (not spouse)? 2
Orphan or ward of the court? 2
Veteran of the U.S. Armed Forces? 2
Dependency Status (CPS Compute) D
Dependency Status (EDExpress): D
Dependency Override:

Step Four: Parental Information

Current marital status: 1
Father's/Stepfather's SSN: ___-__-____
Father's/Stepfather's Last Name:
Mother's/Stepmother's SSN: ___-__-____
Mother's/Stepmother's Last Name:
Number in household in 2000-2001: 15
Number of college students in 2000-2001: 1
State of Legal Residence: VA
Residents before 1-1-1995? 1
Date of Legal Residence: __/____

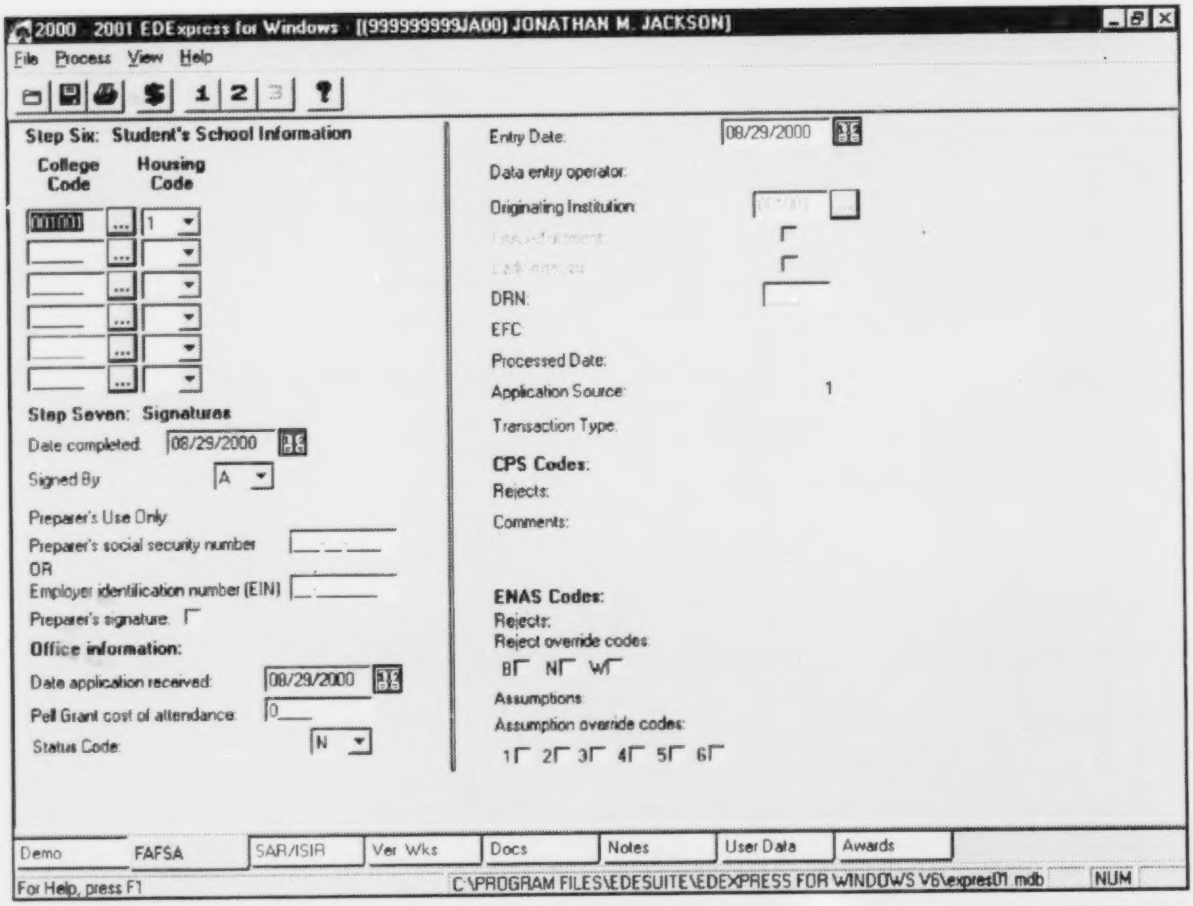
Age of older parent:
1999 U.S. income tax return status: 1
1999 U.S. income tax figures from: 1
Were your parents eligible to file a 1040A or 1040EZ? 2
1999 Adjusted Gross Income:
1999 U.S. income tax paid:
1999 Total number of exemptions:
Earned Income Credit:
1999 Father's/Stepfather's income: $15,500
1999 Mother's/Stepmother's income: $12,000
Total from Worksheet A:
Total from Worksheet B:
Cash, savings, and checking accounts: $300
Current net worth of investments:
Current net worth of business:
Current net worth of investment farm:

Step Five: Student's Household Information

Number in household in 2000-2001:
Number of college students in 2000-2001:

Entry Screen 3

Screen 3 includes FAFSA Steps 6 and 7, office information, and assumption and reject override codes.


2000 - 2001 EDExpress for Windows - [(999999999JA00) JONATHAN M. JACKSON]
File
Process
View
Help
$
1
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3
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Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards
NUM

Step Six: Student's School Information

College Code	Housing Code
001001	1

Step Seven: Signatures

Date completed: 08/29/2000

Signed By: A

Preparer's Use Only

Preparer's social security number: ___-__-____

OR

Employer identification number (EIN): __-_______

Preparer's signature: ☐

Office information:

Date application received: 08/29/2000

Pell Grant cost of attendance: 0

Status Code: N

Entry Date: 08/29/2000

Data entry operator:

Originating Institution:

DRN:

EFC

Processed Date:

Application Source: 1

Transaction Type:

CPS Codes:

Rejects:

Comments:

ENAS Codes:

Rejects:

Reject override codes:

B☐ N☐ W☐

Assumptions:

Assumption override codes:

1☐ 2☐ 3☐ 4☐ 5☐ 6☐

For Help, press F1

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Reject and Assumption Overrides

You can use page 3 of the FAFSA tab to set assumption or reject override codes. If you set a code, the CPS will not assume values when calculating the EFC and will not apply edits that would otherwise reject a record.

Verifiable FAFSA Reject Codes

These are the only codes for rejected data that you or the student can change or verify as correct. You may revise these data or leave them unchanged.

Reject Code	Reject Reason	Resolution
B	Date of birth since September 1, 1983 and does not equal the current year	Verify of correct the following: - Date of birth
N	Missing name	Verify or correct the following: Student's Last Name Student's First Name
W	Questionable number of family members	*If the applicant is dependent,* verify or correct the following: Parent's Number of Family Members *If the applicant is independent,* verify or correct the following: - Student's Number of Family Members

Assumption Override Codes

EDExpress contains edits to identify incomplete and/or questionable application data. Use the following codes to override these assumptions.

Assumption Override	Description	Results of Set Flag
1	Parents' number in college assumed to be 1	Allow number in college to be greater than 6
2	Parents' AGI assumed equal to the sum of father and mother earned income portions	Allow parents' AGI to be zero or blank as entered
3	Student's number in college assumed to be 1	Allow number in college to be equal to number of family members and both greater than 2
4	Student's AGI assumed to be equal to the sum of the student's and spouse's earned income portions	Allow student's AGI to be zero or blank as entered
5	Parents' income from worksheet #B assumed to be zero	Allow parents' income from worksheet #B to be equal or greater than 90% of parents total income
6	Student's income from worksheet #B assumed to be zero	Allow student's income from worksheet #B to be equal to or greater than student's (and spouse's) total income

*Click **Save***

*If you have not entered data in all required fields, EDExpress prompts you to do so before it will save the record. Press **F1** to see valid entries for required fields.*

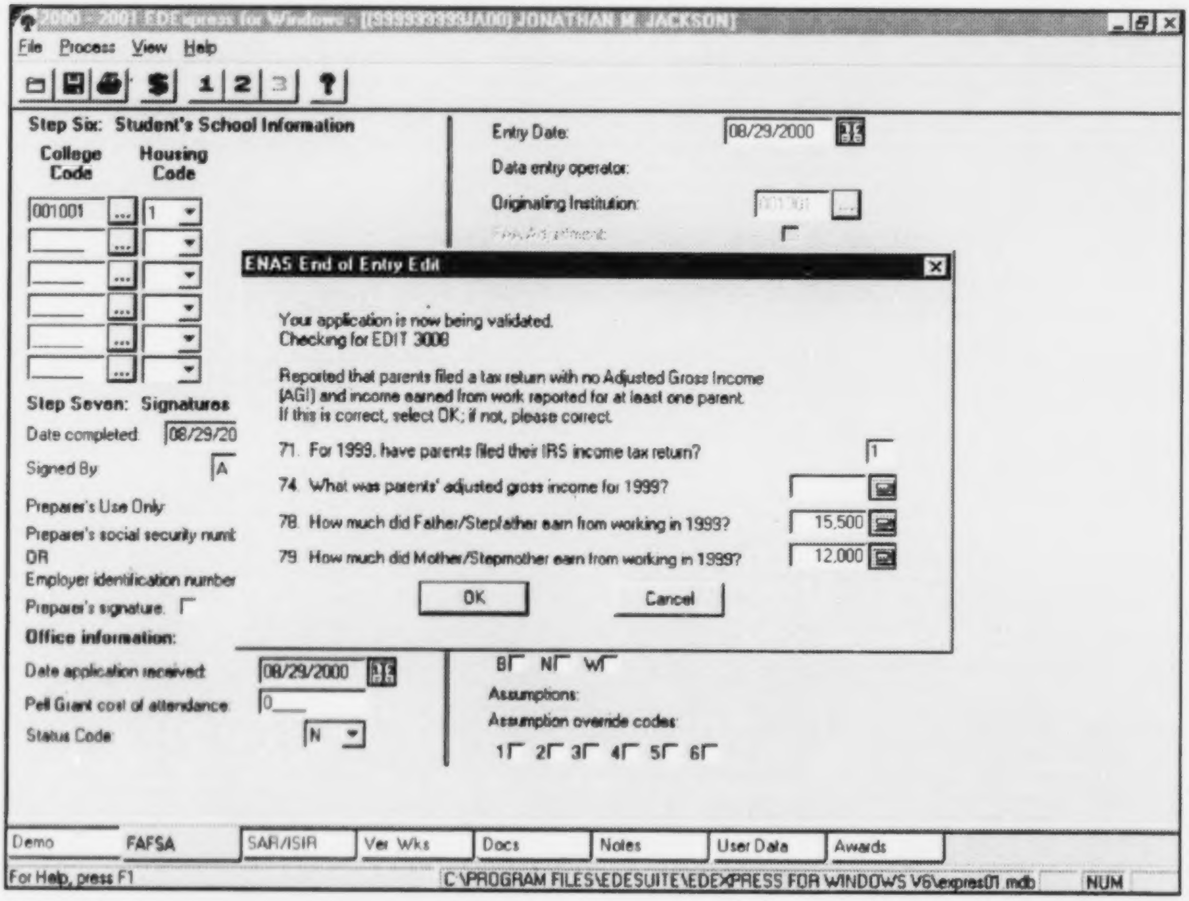
*Enter the correct AGI. For this student, enter **27,500**.*

*Click **OK**.*

During the save process, EDExpress performs end-of-entry edits verifying the contents of fields. This process will identify any discrepancy between data fields, thereby preventing potential rejects by CPS.

However, the FAA must manually enter the appropriate reject override or assumption override code(s) if applicable.

In this example, the parent's adjusted gross income is missing and must be entered to resolve the edit.


2000 - 2001 EDExpress for Windows - [(999999999JA00) JONATHAN M. JACKSON]
File Process View Help
1 2 3 ?
Demo FAFSA SAR/ISIR Ver Wks Docs Notes User Data Awards
NUM

Step Six: Student's School Information

College Code	Housing Code
001001	1

Step Seven: Signatures

Date completed: 08/29/20

Signed By: A

Preparer's Use Only

Preparer's social security numb

OR

Employer identification number

Preparer's signature: ☐

Office information:

Date application received: 08/29/2000

Pell Grant cost of attendance: 0

Status Code: N

Entry Date: 08/29/2000

Data entry operator:

Originating Institution: 001001

B ☐ N ☐ W ☐

Assumptions:

Assumption override codes:

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐

ENAS End of Entry Edit

Your application is now being validated.
Checking for EDIT 3008

Reported that parents filed a tax return with no Adjusted Gross Income (AGI) and income earned from work reported for at least one parent. If this is correct, select OK; if not, please correct.

71. For 1999, have parents filed their IRS income tax return? 1
74. What was parents' adjusted gross income for 1999?
78. How much did Father/Stepfather earn from working in 1999? 15,500
79. How much did Mother/Stepmother earn from working in 1999? 12,000

OK Cancel

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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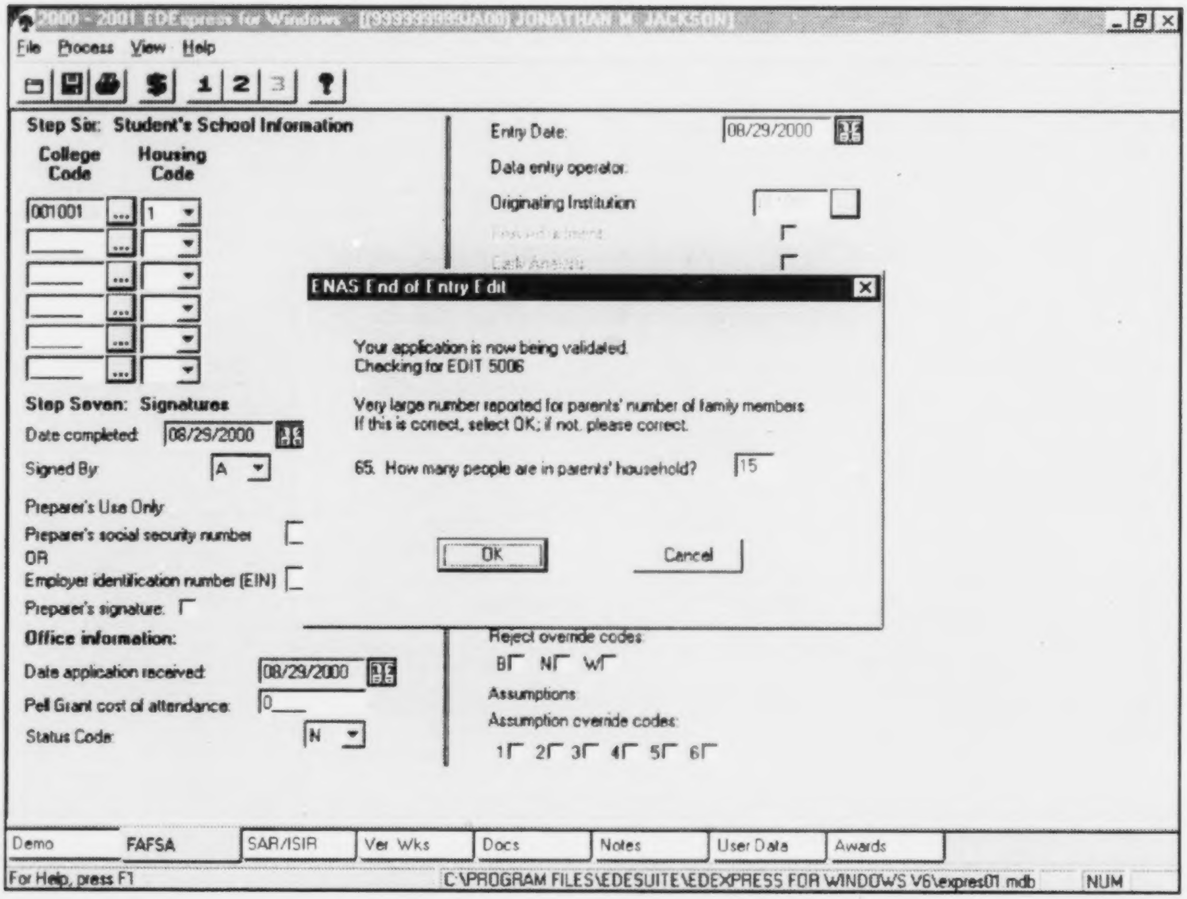
The message below shows the edit for number in household. We know that this student really does have 15 people in his family.

Click ***OK.***


2000 - 2001 EDExpress for Windows - [[999999999JA00] JONATHAN M. JACKSON]
File
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View
Help
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1
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?
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Step Six: Student's School Information

College Code	Housing Code
001001	1

Step Seven: Signatures

Date completed: 08/29/2000
Signed By: A
Preparer's Use Only
Preparer's social security number ☐
OR
Employer identification number (EIN) ☐
Preparer's signature: ☐

Office information:

Date application received: 08/29/2000
Pell Grant cost of attendance: 0
Status Code: N

Entry Date: 08/29/2000
Data entry operator:
Originating Institution:
Reject override codes: B☐ N☐ W☐
Assumptions:
Assumption override codes: 1☐ 2☐ 3☐ 4☐ 5☐ 6☐

ENAS End of Entry Edit

Your application is now being validated.
Checking for EDIT 5006

Very large number reported for parents' number of family members
If this is correct, select OK; if not, please correct.

65. How many people are in parents' household? 15

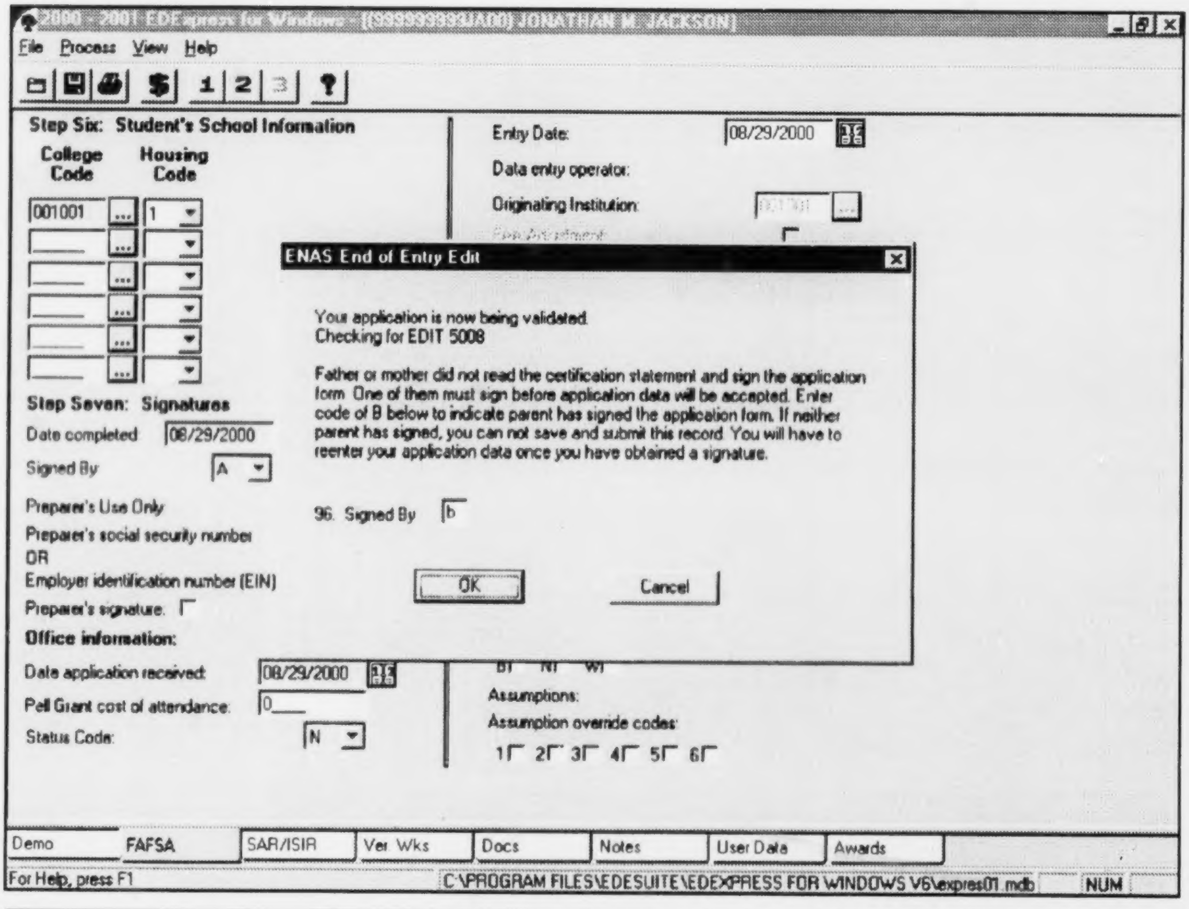
OK   Cancel

*Type **B** in the Signed By field*

*Click **OK**.*

The last error we see is that neither parent has signed the application.

This was a data entry omission. The father and the student signed the application.


2000 - 2001 EDExpress for Windows - [(999999999JA00) JONATHAN M. JACKSON]
File Process View Help
$ 1 2 3 ?
Demo FAFSA SAR/ISIR Ver Wks Docs Notes User Data Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Step Six: Student's School Information

College Code	Housing Code
001001	1

Entry Date: 08/29/2000

Data entry operator:

Originating Institution:

Step Seven: Signatures

Date completed: 08/29/2000

Signed By: A

Preparer's Use Only

Preparer's social security number

OR

Employer identification number (EIN)

Preparer's signature: ☐

Office information:

Date application received: 08/29/2000

Pell Grant cost of attendance: 0

Status Code: N

Assumptions:

Assumption override codes:

1☐ 2☐ 3☐ 4☐ 5☐ 6☐

ENAS End of Entry Edit

Your application is now being validated.
Checking for EDIT 5008

Father or mother did not read the certification statement and sign the application form. One of them must sign before application data will be accepted. Enter code of B below to indicate parent has signed the application form. If neither parent has signed, you can not save and submit this record. You will have to reenter your application data once you have obtained a signature.

96. Signed By: b

OK Cancel

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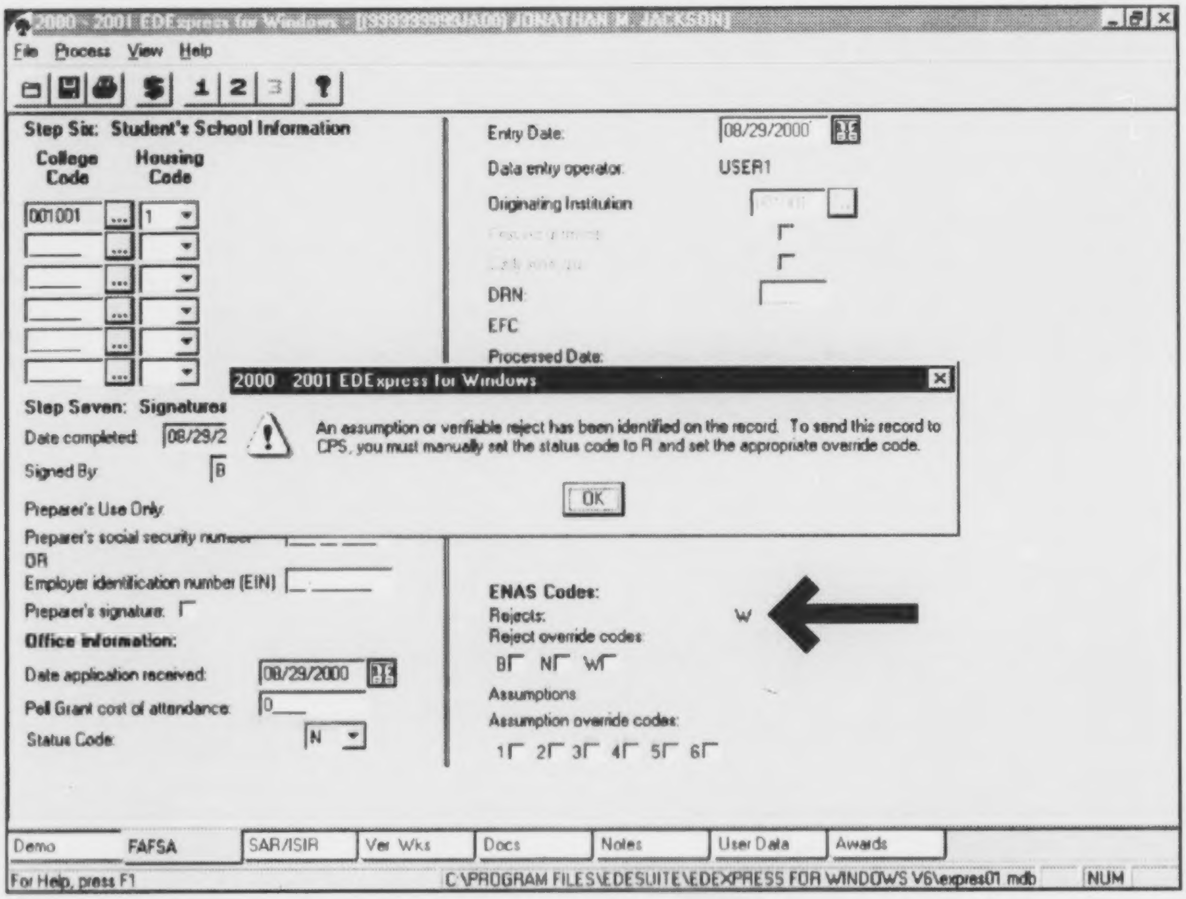
EDExpress then alerts you that an assumption or verifiable reject has been identified on this record. The software also marks the record with the appropriate assumptions or rejects.

Note the W listed under ENAS codes and Rejects.

*Click **OK***


2000 - 2001 EDExpress for Windows - [999999999JA00] JONATHAN M. JACKSON]
File Process View Help
$ 1 2 3 ?
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards
NUM

Step Six: Student's School Information

College Code	Housing Code
001001	1

Step Seven: Signatures

Date completed: 08/29/2

Signed By: B

Preparer's Use Only

Preparer's social security number

OR

Employer identification number (EIN)

Preparer's signature: ☐

Office information:

Date application received: 08/29/2000

Pell Grant cost of attendance: 0

Status Code: N

Entry Date: 08/29/2000

Data entry operator: USER1

Originating Institution

DRN:

EFC

Processed Date:

ENAS Codes:

Rejects: W

Reject override codes:

B☐ N☐ W☐

Assumptions

Assumption override codes:

1☐ 2☐ 3☐ 4☐ 5☐ 6☐

2000 - 2001 EDExpress for Windows

An assumption or verifiable reject has been identified on the record. To send this record to CPS, you must manually set the status code to R and set the appropriate override code.

OK

For Help, press F1

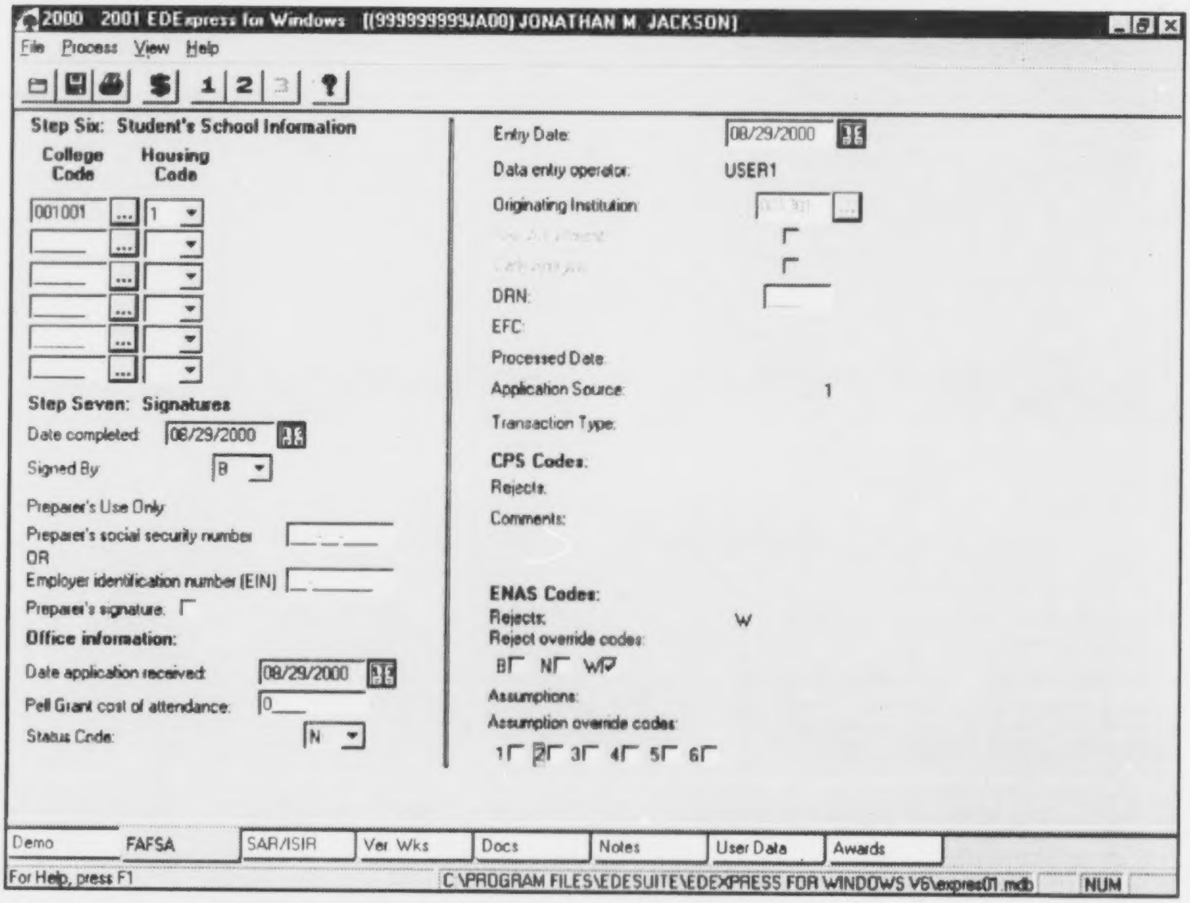
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

*Click **W**.*

*Select **R** as the Status Code*

*Click the **Save** button*

This student has Reject W and Assumption 2. Check the record to make sure that you should override the reject and assumption. If so, click the W check box.


2000 2001 EDExpress for Windows [(999999999JA00) JONATHAN M. JACKSON]
File
Process
View
Help
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Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards

Step Six: Student's School Information

College Code	Housing Code
001001	1

Step Seven: Signatures

Date completed: 08/29/2000

Signed By: B

Preparer's Use Only

Preparer's social security number ___-__-____

OR

Employer identification number (EIN) __-_______

Preparer's signature: ☐

Office information:

Date application received: 08/29/2000

Pell Grant cost of attendance: 0

Status Code: N

Entry Date: 08/29/2000

Data entry operator: USER1

Originating Institution:

☐

☐

DRN:

EFC:

Processed Date:

Application Source: 1

Transaction Type:

CPS Codes:

Rejects:

Comments:

ENAS Codes:

Rejects: W

Reject override codes:

B ☐ N ☐ W ☑

Assumptions:

Assumption override codes:

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐

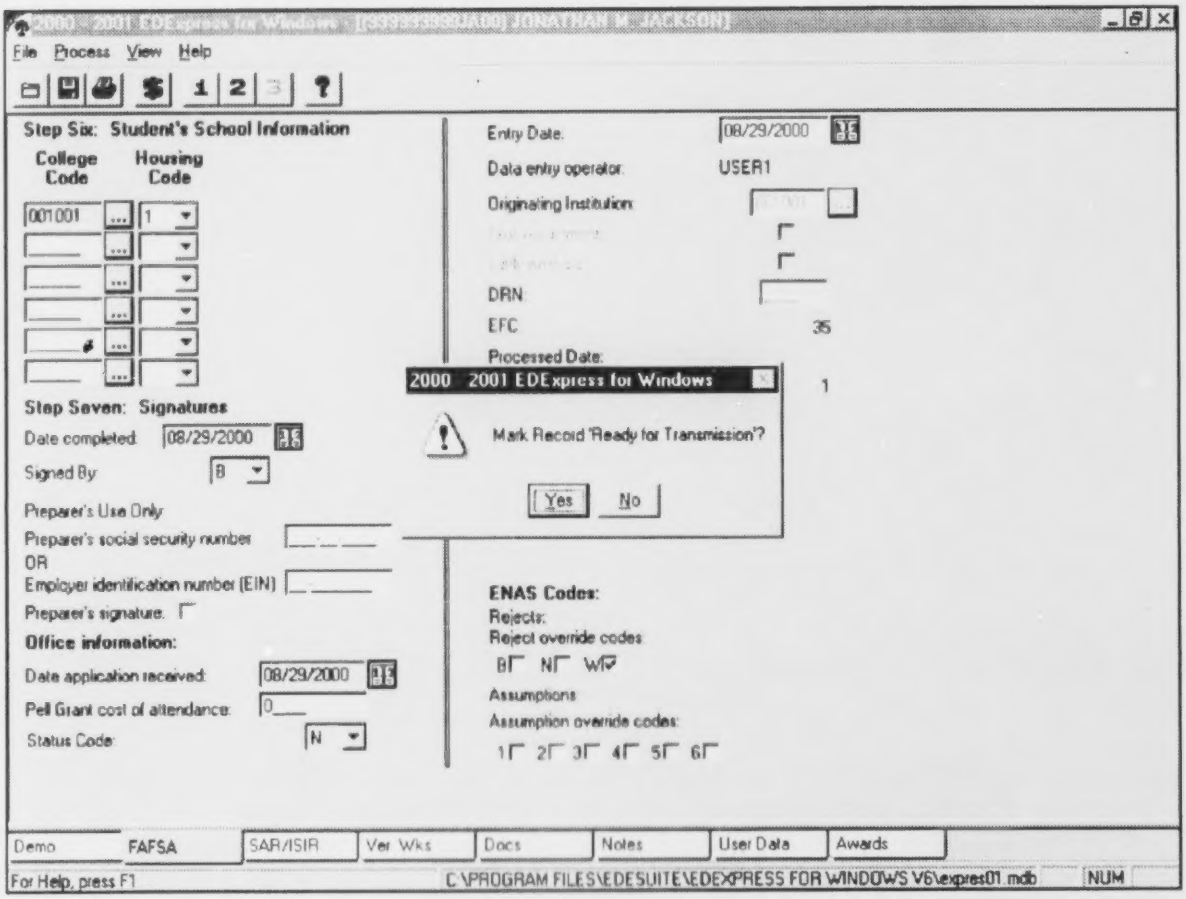
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

EDExpress has removed the Reject W and asks if you want to mark the record Ready to Transmit.

*Click **Yes** to mark the record ready to transmit.*

*Click **OK** on the "Records Updates Saved" message*


2000 - 2001 EDExpress for Windows - [999999999JA00] JONATHAN M. JACKSON]

Step Six: Student's School Information

College Code	Housing Code
001001	1

Step Seven: Signatures

Date completed: 08/29/2000

Signed By: B

Preparer's Use Only

Preparer's social security number

OR

Employer identification number (EIN)

Preparer's signature: ☐

Office information:

Date application received: 08/29/2000

Pell Grant cost of attendance: 0

Status Code: N

Entry Date: 08/29/2000

Data entry operator: USER1

Originating Institution:

DRN:

EFC: 35

Processed Date:

2000 2001 EDExpress for Windows

Mark Record 'Ready for Transmission'?

ENAS Codes:

Rejects:

Reject override codes:

B ☐ N ☐ W ☑

Assumptions:

Assumption override codes:

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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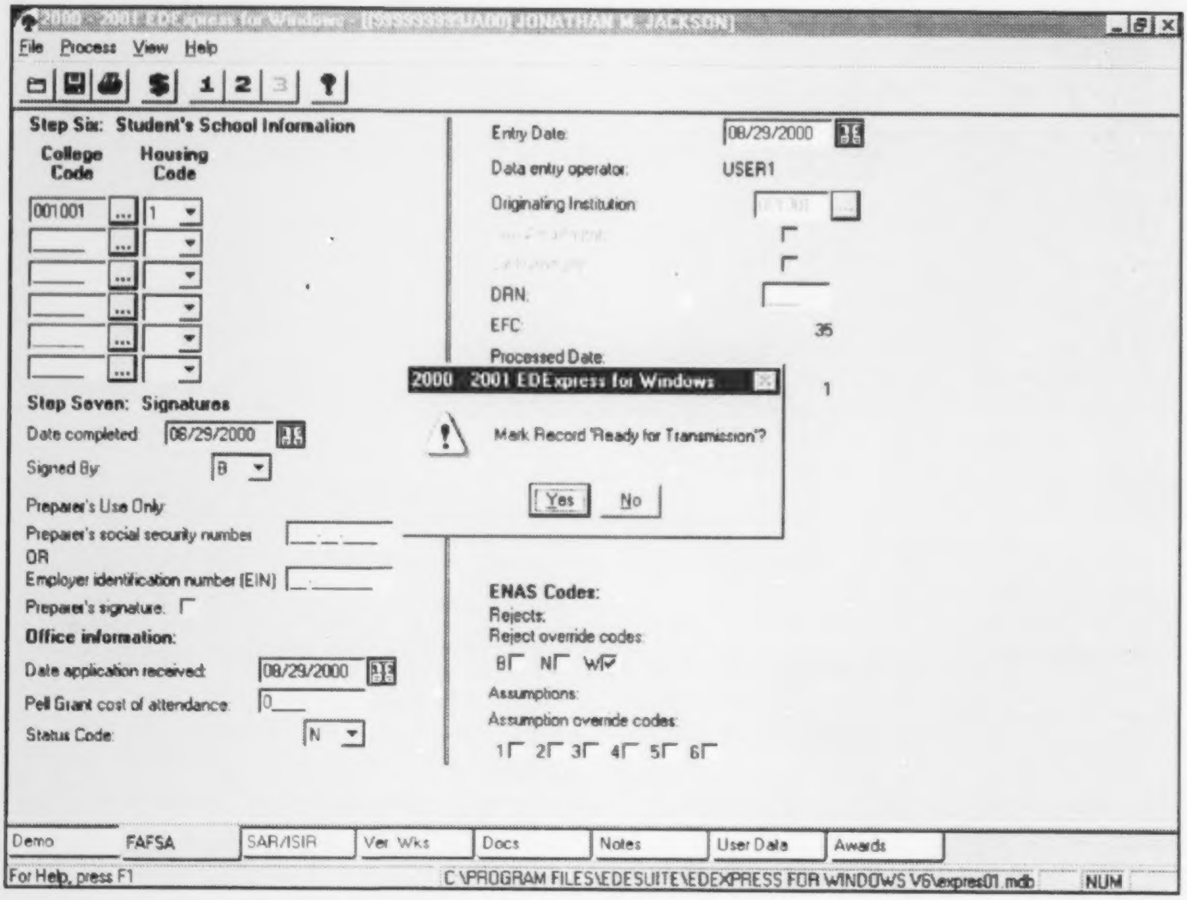
Saving a Record

*Select **File/Save** to save the record to the database.*

*Click **Yes** if the record is ready to transmit, or click **No** if it is not ready.*

If the record you have entered does not trigger any End of Entry edits, EDExpress will display a dialogue box asking if this record is ready to transmit. Once a record is marked Ready for Transmission, the status code changes from N to R. It will then be included in the next batch of exported applications.

Status Code Values	
N	Not Ready to Send
R	Ready to Send
B	Batched
NEW! I	Incomplete



2000 - 2001 EDExpress for Windows - [999999999JA00] JONATHAN M. JACKSON]

Step Six: Student's School Information

College Code	Housing Code
001001	1

Step Seven: Signatures

Date completed: 08/29/2000

Signed By: B

Preparer's Use Only:

Preparer's social security number: ___-__-____

OR

Employer identification number (EIN): __-_______

Preparer's signature: ☐

Office information:

Date application received: 08/29/2000

Pell Grant cost of attendance: 0

Status Code: N

Entry Date: 08/29/2000

Data entry operator: USER1

Originating Institution:

DRN:

EFC: 35

Processed Date:

1

2000 - 2001 EDExpress for Windows

Mark Record 'Ready for Transmission'?

ENAS Codes:

Rejects:

Reject override codes:

B☐ N☐ W☑

Assumptions:

Assumption override codes:

1☐ 2☐ 3☐ 4☐ 5☐ 6☐

For Help, press F1

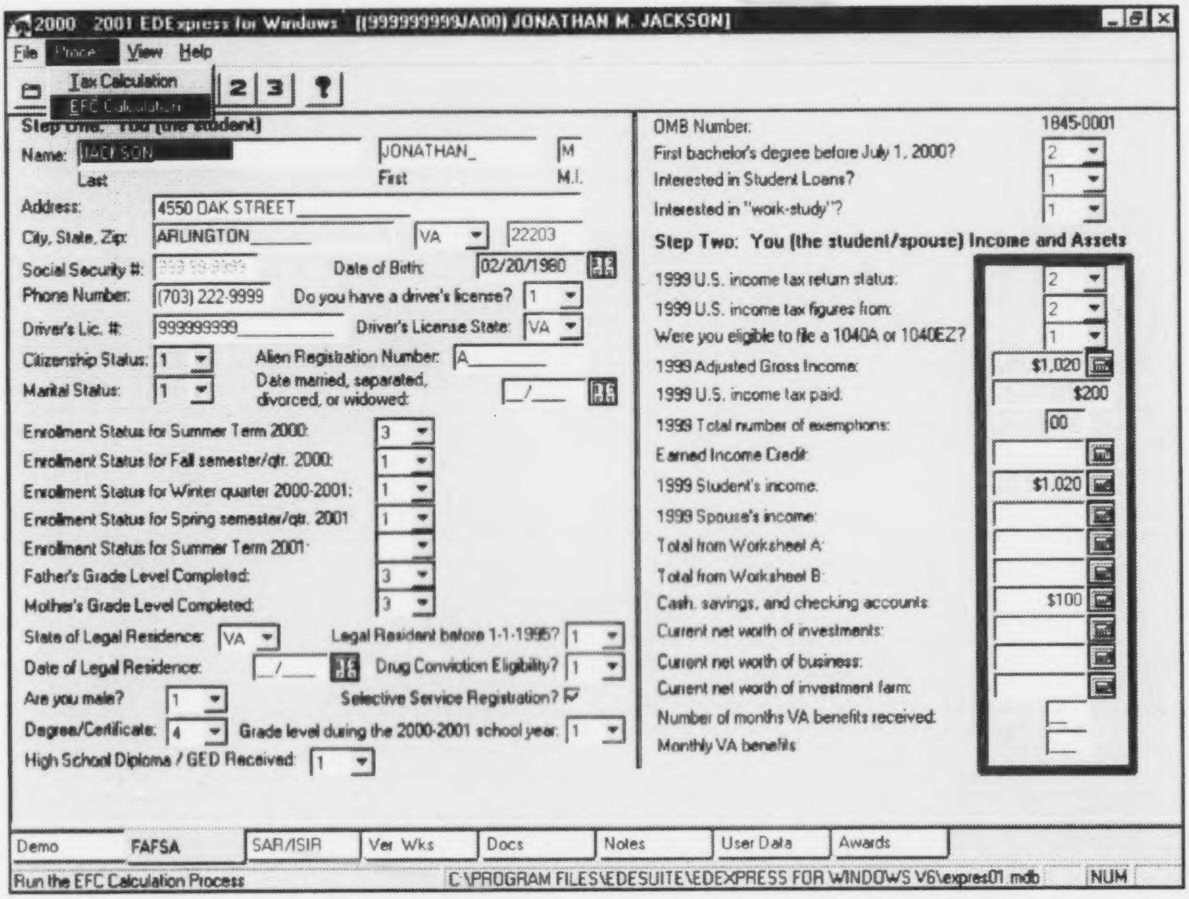
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Calculate an Estimated EFC

You can calculate an estimated EFC based on the application data you have entered before the data is sent to CPS. This EFC is for information only; it may not be used for payment of Title IV funds.

*To open a file, select **File/Open**. Enter the SSN for the desired file, and when the file is retrieved click on the **FAFSA** tab.*

*Select **Process/EFC Calculation**.*



2000 2001 EDExpress for Windows [(999999999JA00) JONATHAN M. JACKSON]

Step One: You (the student)

Name: JACKSON (Last) JONATHAN_ (First) M (M.I.)
Address: 4550 OAK STREET
City, State, Zip: ARLINGTON VA 22203
Social Security #: [illegible]
Date of Birth: 02/20/1980
Phone Number: (703) 222-9999
Do you have a driver's license? 1
Driver's Lic. #: 999999999
Driver's License State: VA
Citizenship Status: 1
Alien Registration Number: A
Marital Status: 1
Date married, separated, divorced, or widowed: __/____
Enrollment Status for Summer Term 2000: 3
Enrollment Status for Fall semester/qtr. 2000: 1
Enrollment Status for Winter quarter 2000-2001: 1
Enrollment Status for Spring semester/qtr. 2001: 1
Enrollment Status for Summer Term 2001:
Father's Grade Level Completed: 3
Mother's Grade Level Completed: 3
State of Legal Residence: VA
Legal Resident before 1-1-1995? 1
Date of Legal Residence: __/____
Drug Conviction Eligibility? 1
Are you male? 1
Selective Service Registration? ☑
Degree/Certificate: 4
Grade level during the 2000-2001 school year: 1
High School Diploma / GED Received: 1

OMB Number: 1845-0001
First bachelor's degree before July 1, 2000? 2
Interested in Student Loans? 1
Interested in "work-study"? 1

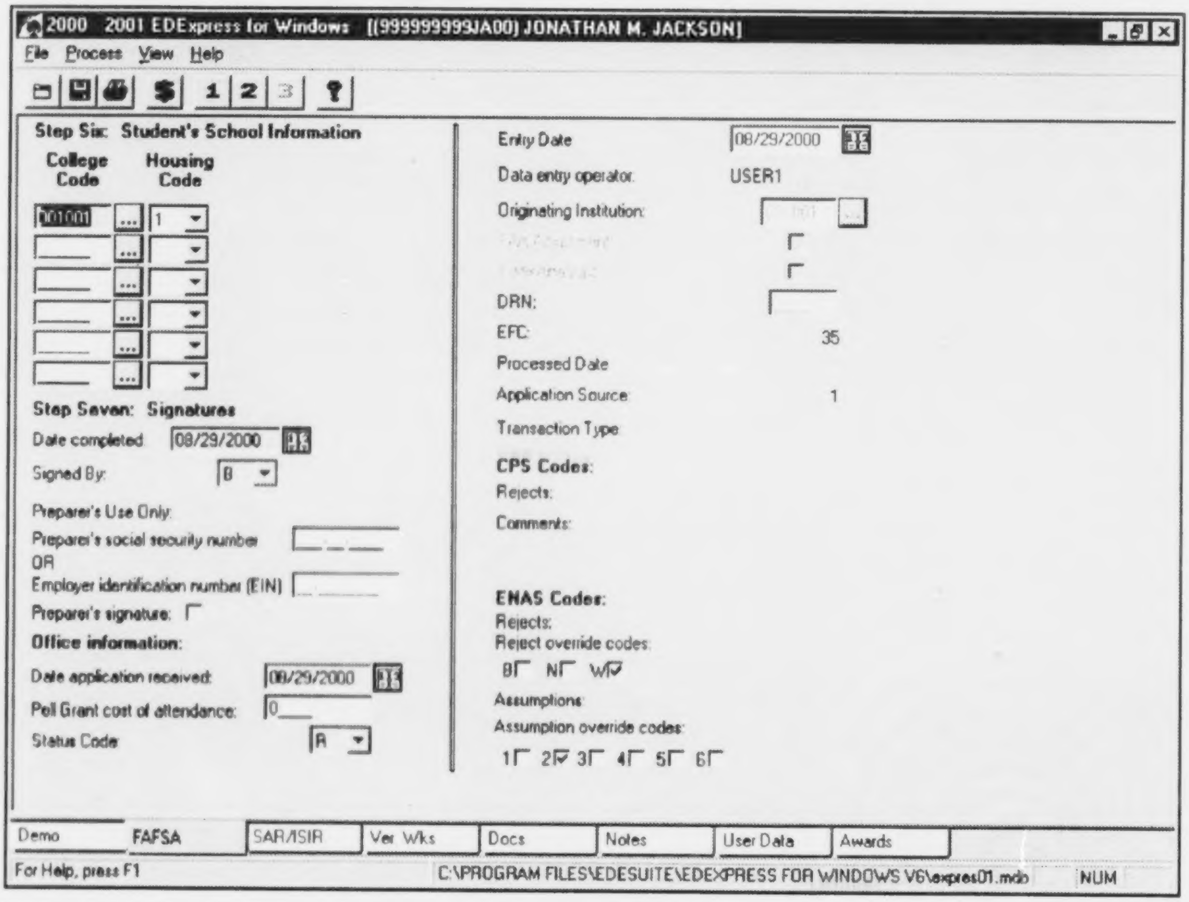
Step Two: You (the student/spouse) Income and Assets

1999 U.S. income tax return status: 2
1999 U.S. income tax figures from: 2
Were you eligible to file a 1040A or 1040EZ? 1
1999 Adjusted Gross Income: $1,020
1999 U.S. income tax paid: $200
1999 Total number of exemptions: 00
Earned Income Credit:
1999 Student's income: $1,020
1999 Spouse's income:
Total from Worksheet A:
Total from Worksheet B:
Cash, savings, and checking accounts: $100
Current net worth of investments:
Current net worth of business:
Current net worth of investment farm:
Number of months VA benefits received:
Monthly VA benefits:

Run the EFC Calculation Process
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

The calculated results appear in the EFC field on FAFSA screen 3.

Tip: If you have not entered data in all required fields, EDExpress prompts you to do so before it will perform the calculation. Once you have entered the required data, you can perform this step. Press F1 to see valid entries for required fields.


2000 2001 EDExpress for Windows [(999999999JA00) JONATHAN M. JACKSON]
File
Process
View
Help
1
2
3
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards

Step Six: Student's School Information

College Code	Housing Code
001001	1

Step Seven: Signatures

Date completed: 08/29/2000

Signed By: B

Preparer's Use Only:

Preparer's social security number

OR

Employer identification number (EIN)

Preparer's signature: ☐

Office information:

Date application received: 08/29/2000

Pell Grant cost of attendance: 0

Status Code: R

Entry Date: 08/29/2000

Data entry operator: USER1

Originating Institution:

☐

☐

DRN:

EFC: 35

Processed Date

Application Source: 1

Transaction Type:

CPS Codes:

Rejects:

Comments:

ENAS Codes:

Rejects:

Reject override codes:

B☐ N☐ W☑

Assumptions:

Assumption override codes:

1☐ 2☑ 3☐ 4☐ 5☐ 6☐

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

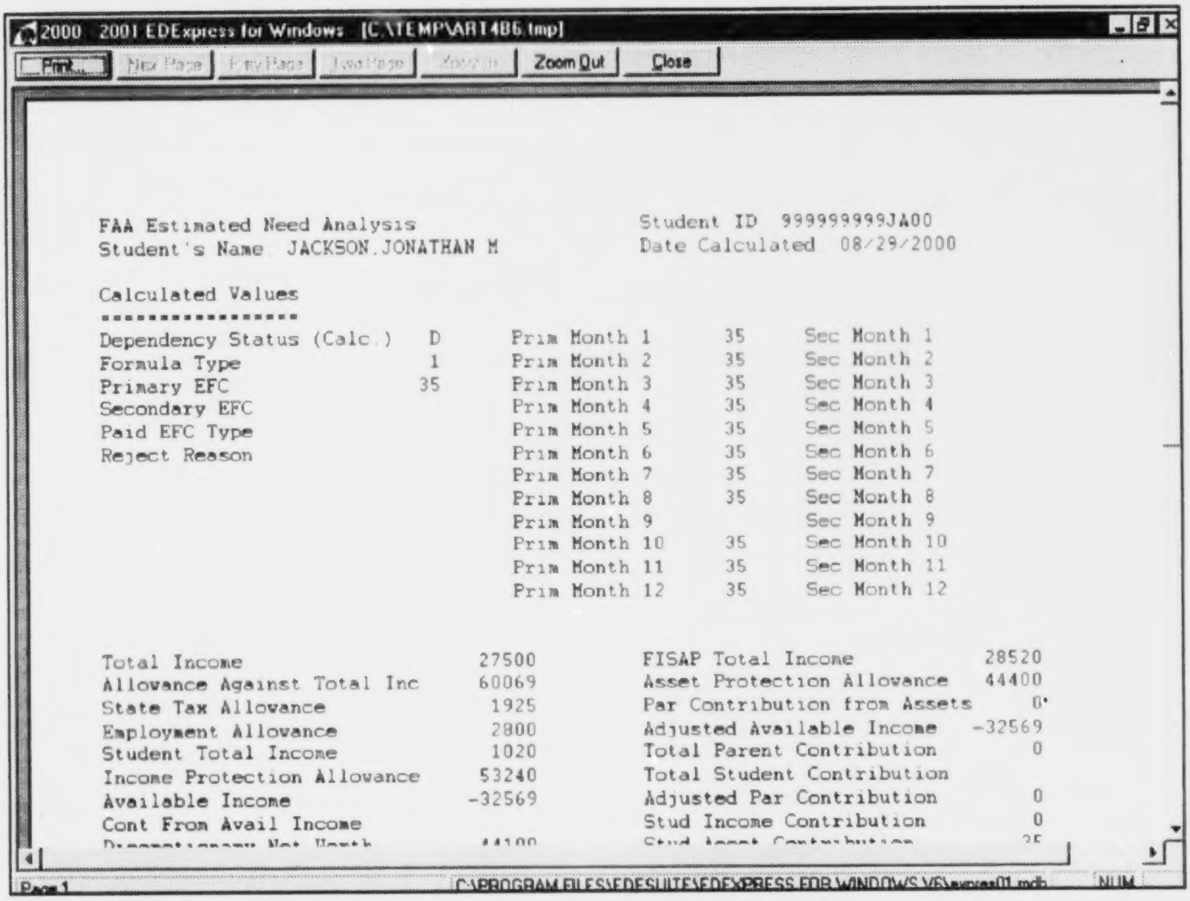
Upon completing the calculation, a FAA Estimated Need Analysis screen will pop up.

In addition to the primary and secondary amounts, EFC values are provided for all 12 months. Also included are the intermediate values used in calculating the EFC.

Click the magnifying glass to view the results.

Click ***Print*** *to print out this information.*

Click the ***Close*** *button to close the box.*


2000 2001 EDExpress for Windows [C:\TEMP\ART486.tmp]
Print...
Next Page
Prev Page
Last Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

```
FAA Estimated Need Analysis                      Student ID  999999999JA00
Student's Name  JACKSON,JONATHAN M               Date Calculated  08/29/2000

Calculated Values
=================
Dependency Status (Calc.)   D      Prim Month 1      35     Sec Month 1
Formula Type                1      Prim Month 2      35     Sec Month 2
Primary EFC                35      Prim Month 3      35     Sec Month 3
Secondary EFC                      Prim Month 4      35     Sec Month 4
Paid EFC Type                      Prim Month 5      35     Sec Month 5
Reject Reason                      Prim Month 6      35     Sec Month 6
                                   Prim Month 7      35     Sec Month 7
                                   Prim Month 8      35     Sec Month 8
                                   Prim Month 9             Sec Month 9
                                   Prim Month 10     35     Sec Month 10
                                   Prim Month 11     35     Sec Month 11
                                   Prim Month 12     35     Sec Month 12


Total Income                      27500      FISAP Total Income             28520
Allowance Against Total Inc       60069      Asset Protection Allowance     44400
State Tax Allowance                1925      Par Contribution from Assets       0
Employment Allowance               2800      Adjusted Available Income     -32569
Student Total Income               1020      Total Parent Contribution          0
Income Protection Allowance       53240      Total Student Contribution
Available Income                 -32569      Adjusted Par Contribution          0
Cont From Avail Income                       Stud Income Contribution           0
```

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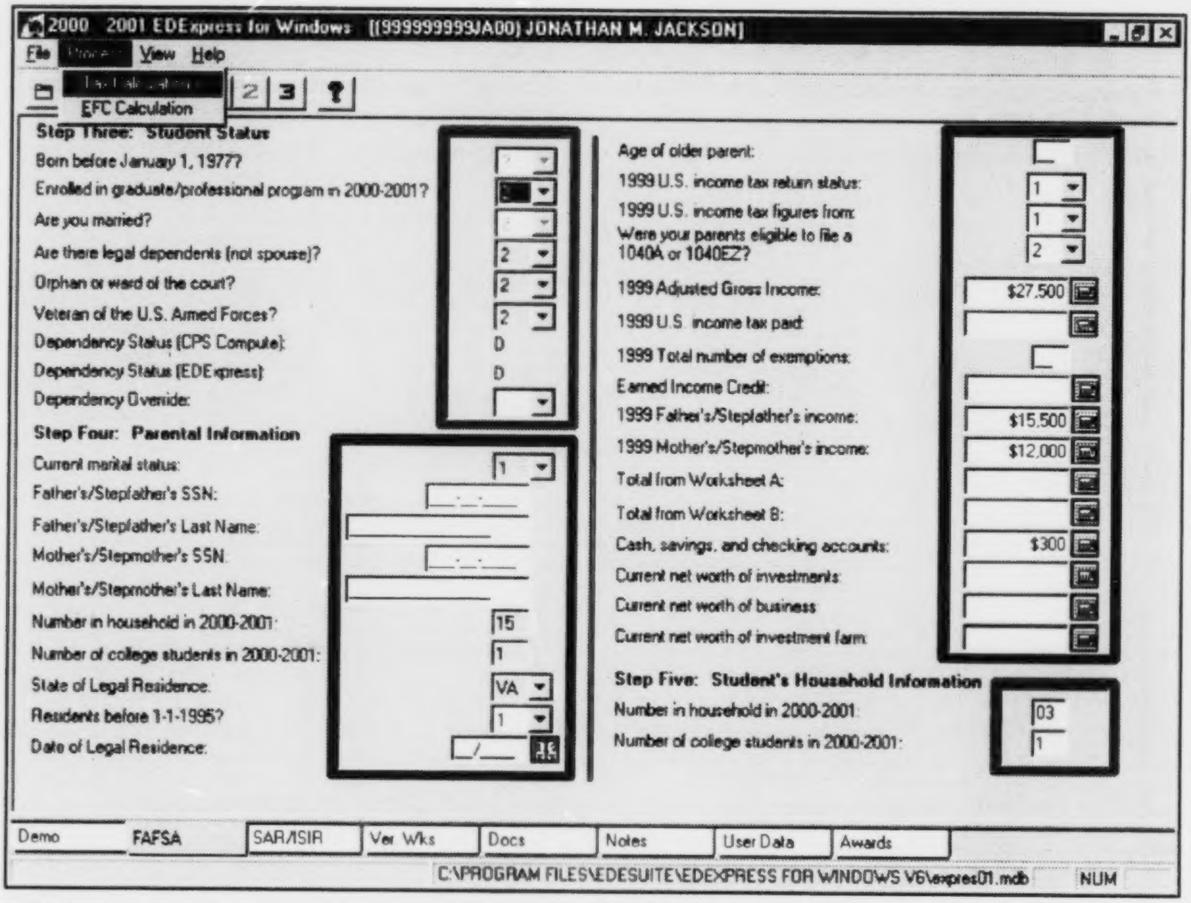
Tax Calculation

Select ***Process/Tax Calculation*** *from the menu.*

If the student or parent has provided only estimated tax information on the paper FAFSA, or if you need to estimate the amount of taxes paid for a new income amount, you can calculate the amount of tax the student/parent would have paid. All required fields (displayed in yellow) must be completed and a value must be present in the tax paid field.



2000 2001 EDExpress for Windows [(999999999JA00) JONATHAN M. JACKSON]

Step Three: Student Status

Born before January 1, 1977?
Enrolled in graduate/professional program in 2000-2001?
Are you married?
Are there legal dependents (not spouse)? 2
Orphan or ward of the court? 2
Veteran of the U.S. Armed Forces? 2
Dependency Status (CPS Compute): D
Dependency Status (EDExpress): D
Dependency Override:

Step Four: Parental Information

Current marital status: 1
Father's/Stepfather's SSN:
Father's/Stepfather's Last Name:
Mother's/Stepmother's SSN:
Mother's/Stepmother's Last Name:
Number in household in 2000-2001: 15
Number of college students in 2000-2001: 1
State of Legal Residence: VA
Residents before 1-1-1995? 1
Date of Legal Residence: __/____

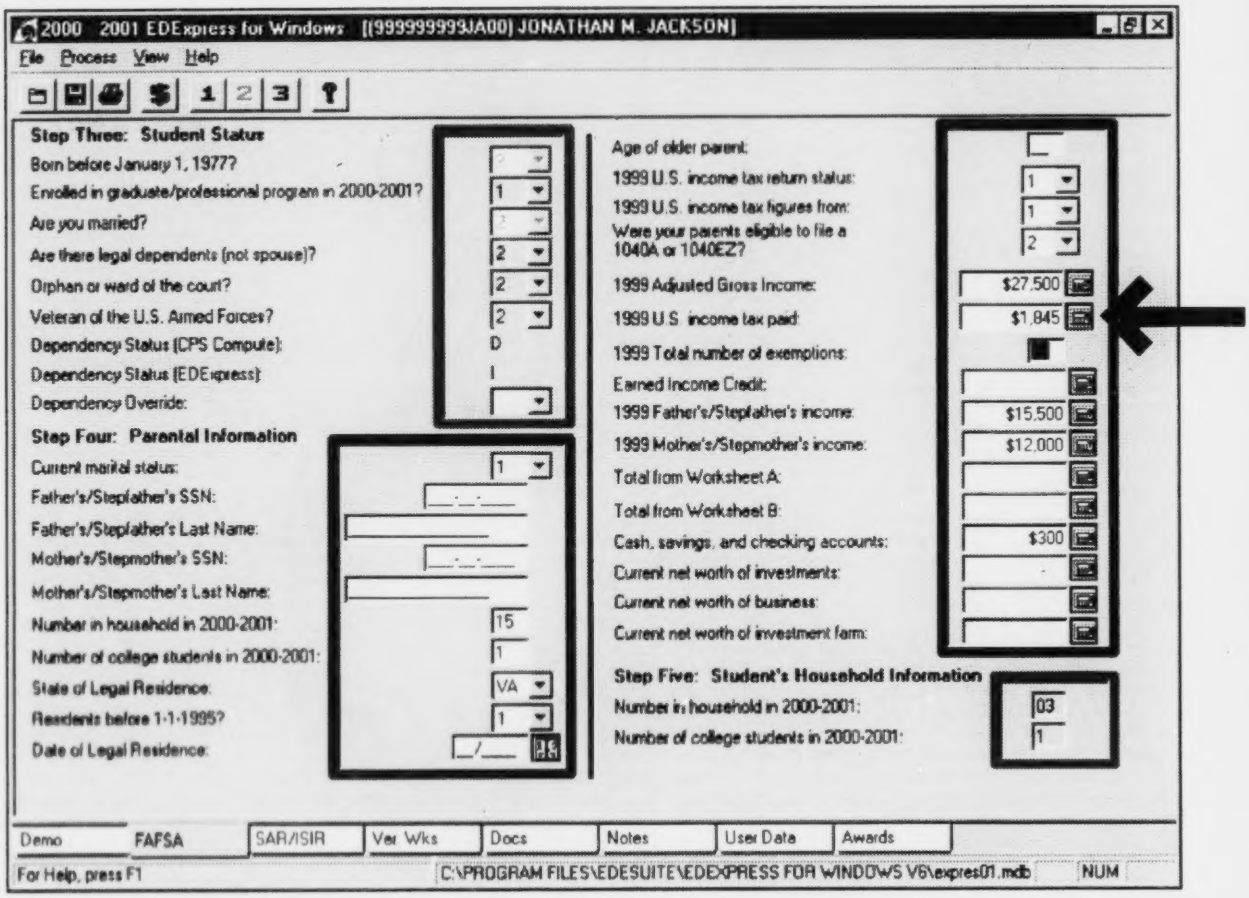
Age of older parent:
1999 U.S. income tax return status: 1
1999 U.S. income tax figures from: 1
Were your parents eligible to file a 1040A or 1040EZ? 2
1999 Adjusted Gross Income: $27,500
1999 U.S. income tax paid:
1999 Total number of exemptions:
Earned Income Credit:
1999 Father's/Stepfather's income: $15,500
1999 Mother's/Stepmother's income: $12,000
Total from Worksheet A:
Total from Worksheet B:
Cash, savings, and checking accounts: $300
Current net worth of investments:
Current net worth of business:
Current net worth of investment farm:

Step Five: Student's Household Information

Number in household in 2000-2001: 03
Number of college students in 2000-2001: 1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

The new calculated tax amount displays in the US Income Tax Paid field.


2000 2001 EDExpress for Windows [(999999999JA00) JONATHAN M. JACKSON]
File
Process
View
Help
1
2
3
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Step Three: Student Status

Born before January 1, 1977?	
Enrolled in graduate/professional program in 2000-2001?	1
Are you married?	
Are there legal dependents (not spouse)?	2
Orphan or ward of the court?	2
Veteran of the U.S. Armed Forces?	2
Dependency Status (CPS Compute):	D
Dependency Status (EDExpress):	I
Dependency Override:	

Step Four: Parental Information

Current marital status:	1
Father's/Stepfather's SSN:	___-__-____
Father's/Stepfather's Last Name:	
Mother's/Stepmother's SSN:	___-__-____
Mother's/Stepmother's Last Name:	
Number in household in 2000-2001:	15
Number of college students in 2000-2001:	1
State of Legal Residence:	VA
Residents before 1-1-1995?	1
Date of Legal Residence:	__/____
Age of older parent:	
1999 U.S. income tax return status:	1
1999 U.S. income tax figures from:	1
Were your parents eligible to file a 1040A or 1040EZ?	2
1999 Adjusted Gross Income:	$27,500
1999 U.S. income tax paid:	$1,845
1999 Total number of exemptions:	
Earned Income Credit:	
1999 Father's/Stepfather's income:	$15,500
1999 Mother's/Stepmother's income:	$12,000
Total from Worksheet A:	
Total from Worksheet B:	
Cash, savings, and checking accounts:	$300
Current net worth of investments:	
Current net worth of business:	
Current net worth of investment farm:	

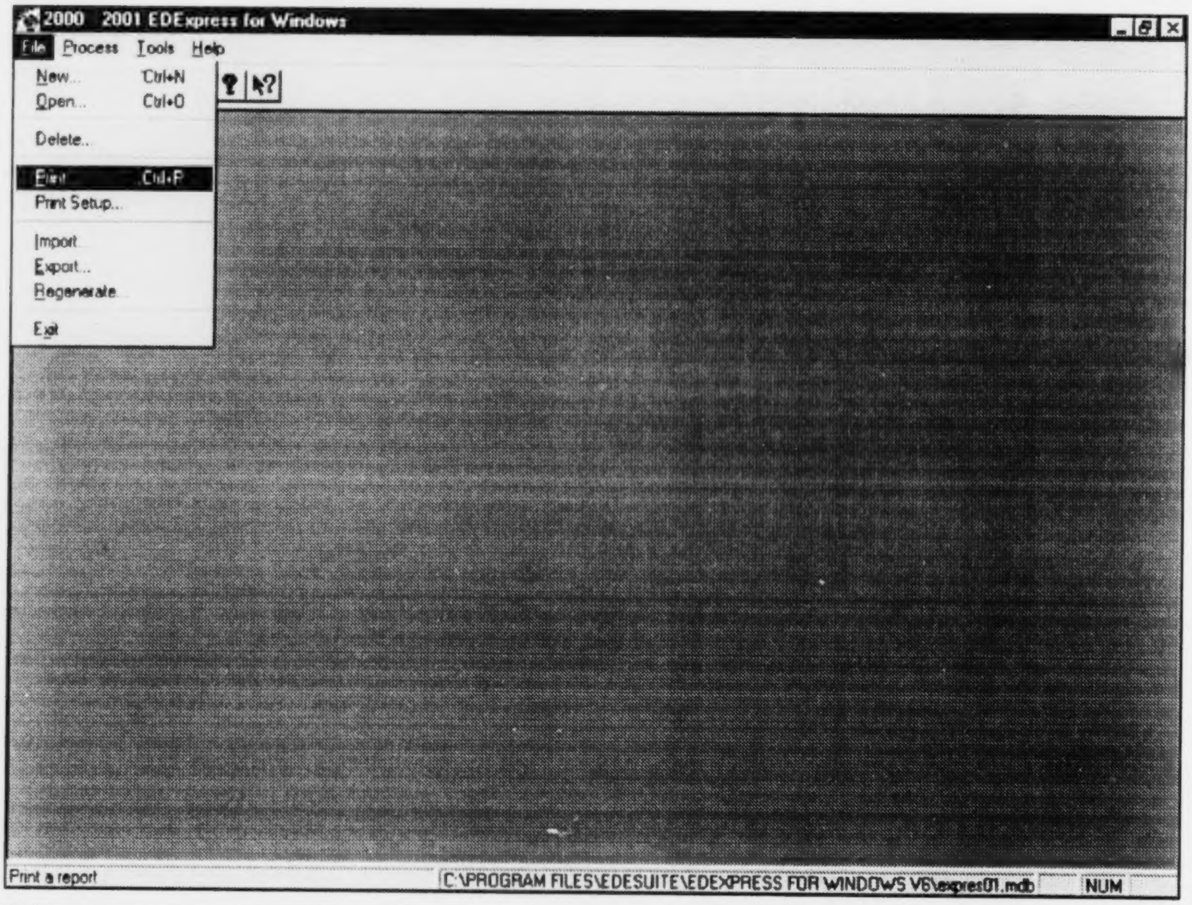
Step Five: Student's Household Information

Number in household in 2000-2001:	03
Number of college students in 2000-2001:	1

Printing a Single FAFSA

*Select **File/Print** from the menu bar*

You may find it necessary to print a copy of the initial application record to place in the student's file. EDExpress processes the FAFSA Print Report, which is a duplicate of the information recorded on the entry screens. You can print one record at a time or multiple records.

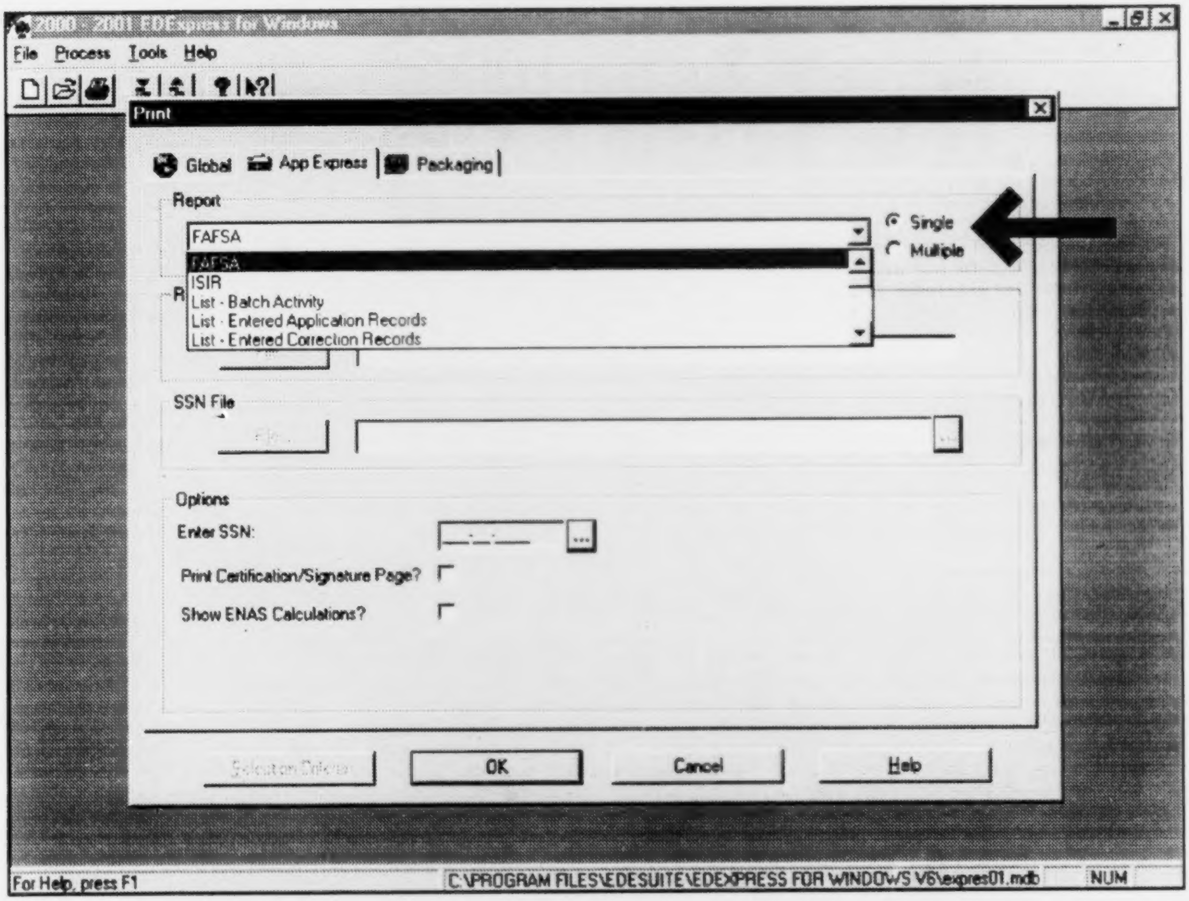

2000 2001 EDExpress for Windows
File
Process
Tools
Help
New... Ctrl+N
Open... Ctrl+O
Delete...
Print... Ctrl+P
Print Setup...
Import...
Export...
Regenerate...
Exit
Print a report
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Select the ***App Express*** *tab.*

Click the down arrow in the Report field to view the items you can print.

Select ***FAFSA****.*

Click the ***Single*** *button to the right of the Report field to indicate that you want to print only one record vs. multiple records.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Print
Global
App Express
Packaging
SSN File
File...
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Report: FAFSA

● Single
○ Multiple

FAFSA
ISIR
List - Batch Activity
List - Entered Application Records
List - Entered Correction Records

Options

Enter SSN: ___-__-____

Print Certification/Signature Page? ☐

Show ENAS Calculations? ☐

BEST COPY AVAILABLE

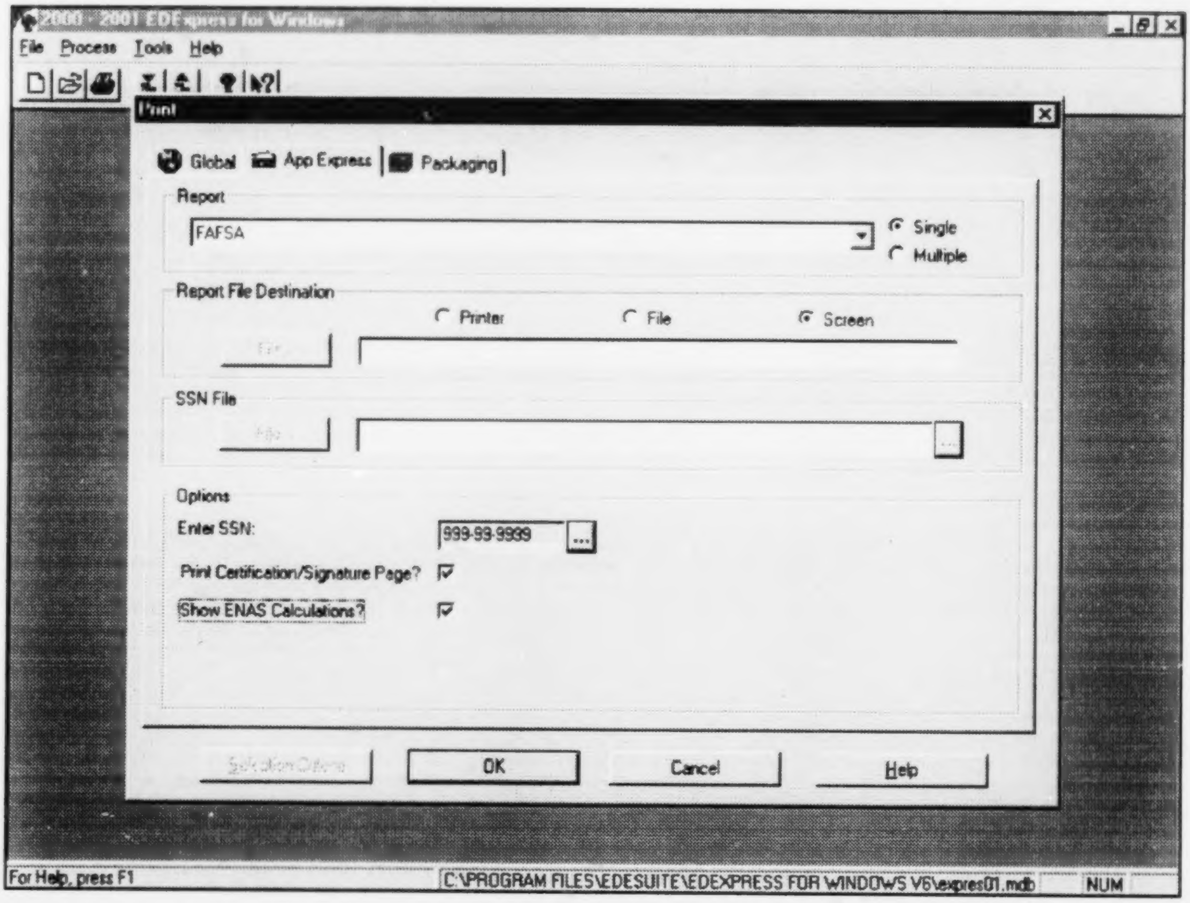
Click ***Printer*****,** ***File****, or* ***Screen*** *in the Report File Destination field.*

Enter the student's Social Security Number in the Enter SSN field.

Click ***Print Certification/ Signature Page?*** *to print this page.*

Click ***Show ENAS Calculations?*** *to include an estimated EFC.*

Click ***OK*** *to print the report.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
File...
File...
Selection Criteria
OK
Cancel
Help

Report: FAFSA
● Single
○ Multiple

Report File Destination
○ Printer
○ File
● Screen

SSN File

Options
Enter SSN: 999-99-9999
Print Certification/Signature Page? ☑
Show ENAS Calculations? ☑

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

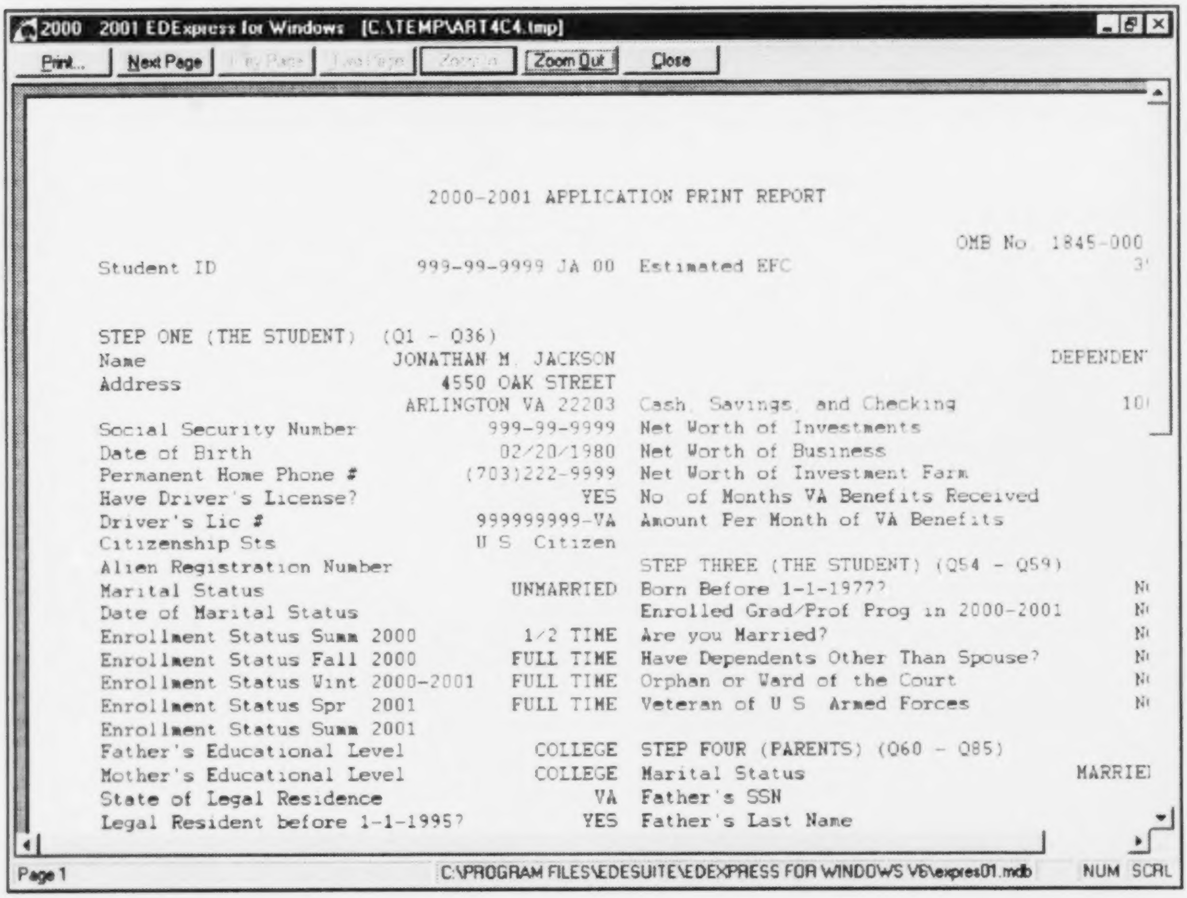
Tip: You can click the Zoom button or click on the document to enlarge in on the screen.

If you print to screen, your cursor will change to a magnifying glass.

Click anywhere on the screen to zoom in on the results.

*You can also click the **Print** button to send the report to the printer.*

*Click the **Close** button to close the report.*


2000 2001 EDExpress for Windows [C:\TEMP\ART4C4.tmp]
Print...
Next Page
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM
SCRL

```
                        2000-2001 APPLICATION PRINT REPORT

                                                                       OMB No  1845-000
Student ID                999-99-9999 JA 00  Estimated EFC                          3'


STEP ONE (THE STUDENT)  (Q1 - Q36)
Name                   JONATHAN M  JACKSON                                   DEPENDEN'
Address                    4550 OAK STREET
                       ARLINGTON VA 22203  Cash  Savings  and Checking              10
Social Security Number         999-99-9999  Net Worth of Investments
Date of Birth                   02/20/1980  Net Worth of Business
Permanent Home Phone #       (703)222-9999  Net Worth of Investment Farm
Have Driver's License?                 YES  No  of Months VA Benefits Received
Driver's Lic #              999999999-VA  Amount Per Month of VA Benefits
Citizenship Sts                U S  Citizen
Alien Registration Number                   STEP THREE (THE STUDENT) (Q54 - Q59)
Marital Status                   UNMARRIED  Born Before 1-1-1977?                    N
Date of Marital Status                      Enrolled Grad/Prof Prog in 2000-2001     N
Enrollment Status Summ 2000       1/2 TIME  Are you Married?                         N
Enrollment Status Fall 2000      FULL TIME  Have Dependents Other Than Spouse?       N
Enrollment Status Wint 2000-2001 FULL TIME  Orphan or Ward of the Court              N
Enrollment Status Spr  2001      FULL TIME  Veteran of U S  Armed Forces             N
Enrollment Status Summ 2001
Father's Educational Level         COLLEGE  STEP FOUR (PARENTS) (Q60 - Q85)
Mother's Educational Level         COLLEGE  Marital Status                      MARRIE
State of Legal Residence                VA  Father's SSN
Legal Resident before 1-1-1995?        YES  Father's Last Name
```

Lesson 1 Exercise

Scenario:

You are a financial aid counselor and you have just completed a student interview for financial aid. The student, Joseph Stewart, is a freshman and came prepared with the necessary information to complete a FAFSA. It is now your responsibility to enter the completed application into EDExpress.

Instructions:

The tasks for this exercised are outlined below. You will complete the tasks and answer questions that pertain to those tasks. **Read the tasks AND the questions before you begin the exercise! Answers to some of the questions may be a part of the task or involve a computer response.**

1. Start EDExpress.

Step	Action
1	Click on the **Start** button.
2	Select **Programs**.
3	Select **EDE Suite**.
4	Select **EDExpress for Windows 2000 – 2001**.
5	Enter **USER1** as the User ID.
6	Enter **USER1** as the Password.

Lesson 1 Exercise, continued

2. Using the attached FAFSA, enter this initial application into EDExpress.

Step	Action
1	Select **File/New** from the menu bar.
2	Type the student's social security number in the text entry box and click **OK** or press **Enter**. The demographic screen is displayed.
3	Type the student's demographic data in the appropriate fields. **NOTE:** Last name or first name and current SSN are the only fields required to create a demo record.
4	Select **File/Save** from the menu bar to save the student's demographic record.
5	Click on the FAFSA tab to open the new FAFSA record for the student.
6	Type the student's application data in the appropriate field(s). Press **Tab** to move forward through the fields. Press **Shift-Tab** to move in reverse. Click the **1**, **2**, or **3** button on the toolbar to move from page to page.
7	Click on File/Save to save the record to the database.

3. When you have entered the record, calculate the EFC.

Step	Action
1	Select Process/EFC Calculation on the menu bar. The calculated results appear in a data window and in the EFC field on FAFSA screen 3. Click **OK**.

Lesson 1 Exercise, continued

1. What is the EFC for Joseph Stewart?

2. What are the two required fields to create a demo record for a student?

3. What is the status code of a record that is marked "Ready for Transmission"?

4. What color are the required entry fields on the FAFSA screens?

5. What function key is used to see valid entries for required fields?

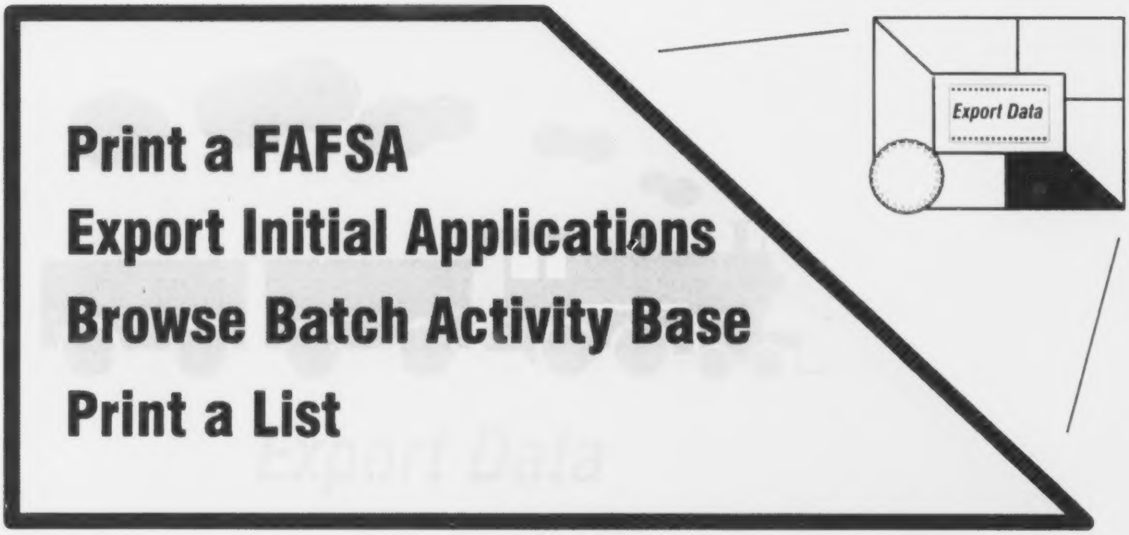
6. What does status code "T" mean?

Lesson 2 – Exporting Data

Objectives

At the end of this lesson you should be able to:

1. Export a batch of application records.
2. Identify the use and function of message classes.
3. Browse the Batch Activity Database.
4. Identify the components of a batch ID.
5. Use the print function to print a list of entered applications.
6. Create a Query from a pre-defined Query.



Print a FAFSA

Export Initial Applications

Browse Batch Activity Base

Print a List

Exporting FAFSA Data

Close any records that are open.

*Select **File/Export** from the menu bar.*

*Click **App Express**.*

*Click the down arrow in the **Export Type** text box to display a list of record types to export.*

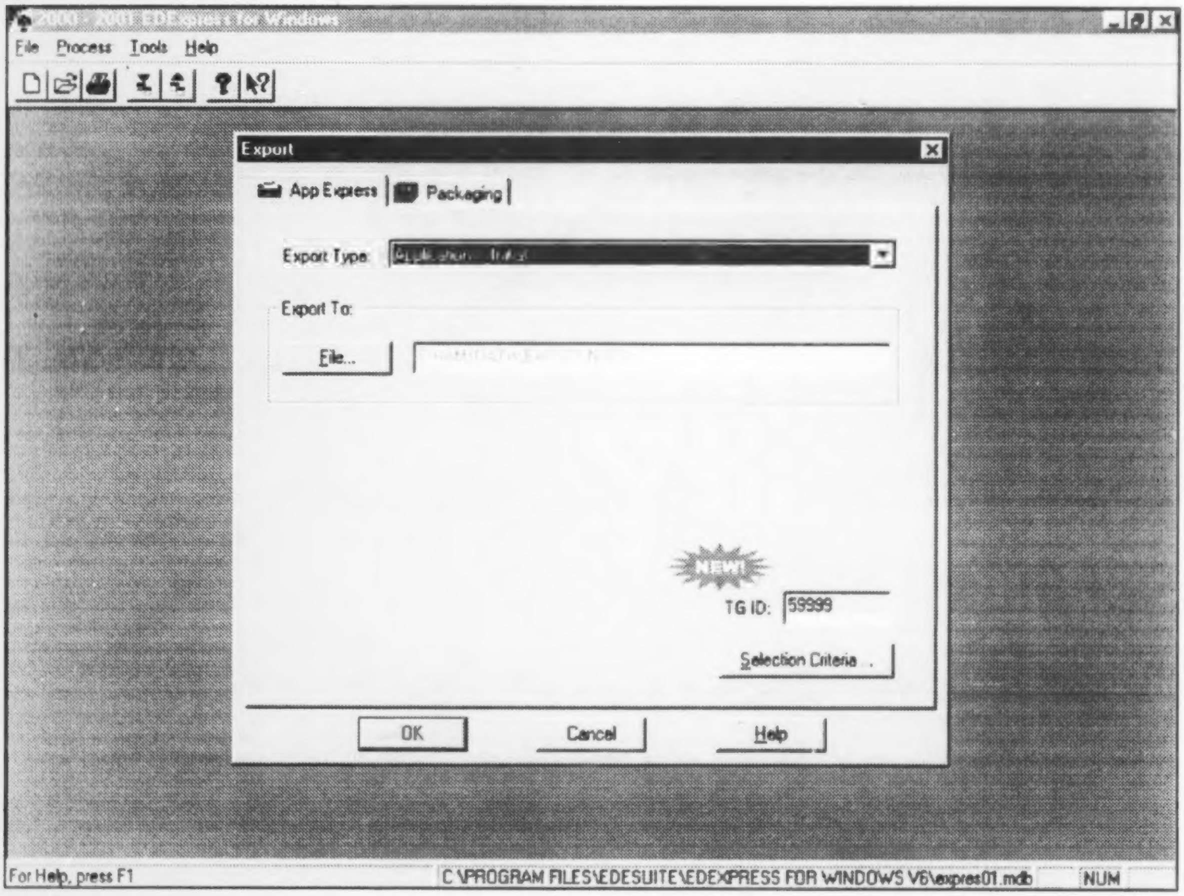
*Click **Applications-Initial**.*

*Click **OK** to export the data.*

The Export function for Application Processing allows you to create batches of all the different types of records you need to transmit to the CPS. These include initial and renewal applications, corrections, and duplicates. Each type of record is batched separately and saved in a file. The exporting function batches like records into a file formatted for transmission to CPS. You still need to transmit your files via EDconnect.

The process for creating an export batch is the same for all types of records. Therefore, in this example we will explain only the process for creating a batch of initial application records.

Note: Records must have a status of "R" (ready for transmission) in order to be batched and exported.


2000 - 2001 EDExpress for Windows
File Process Tools Help
Export
App Express
Packaging
Export To:
File...
NEW!
Selection Criteria...
OK
Cancel
Help
For Help, press F1
NUM

Export Type: Applications - Initial

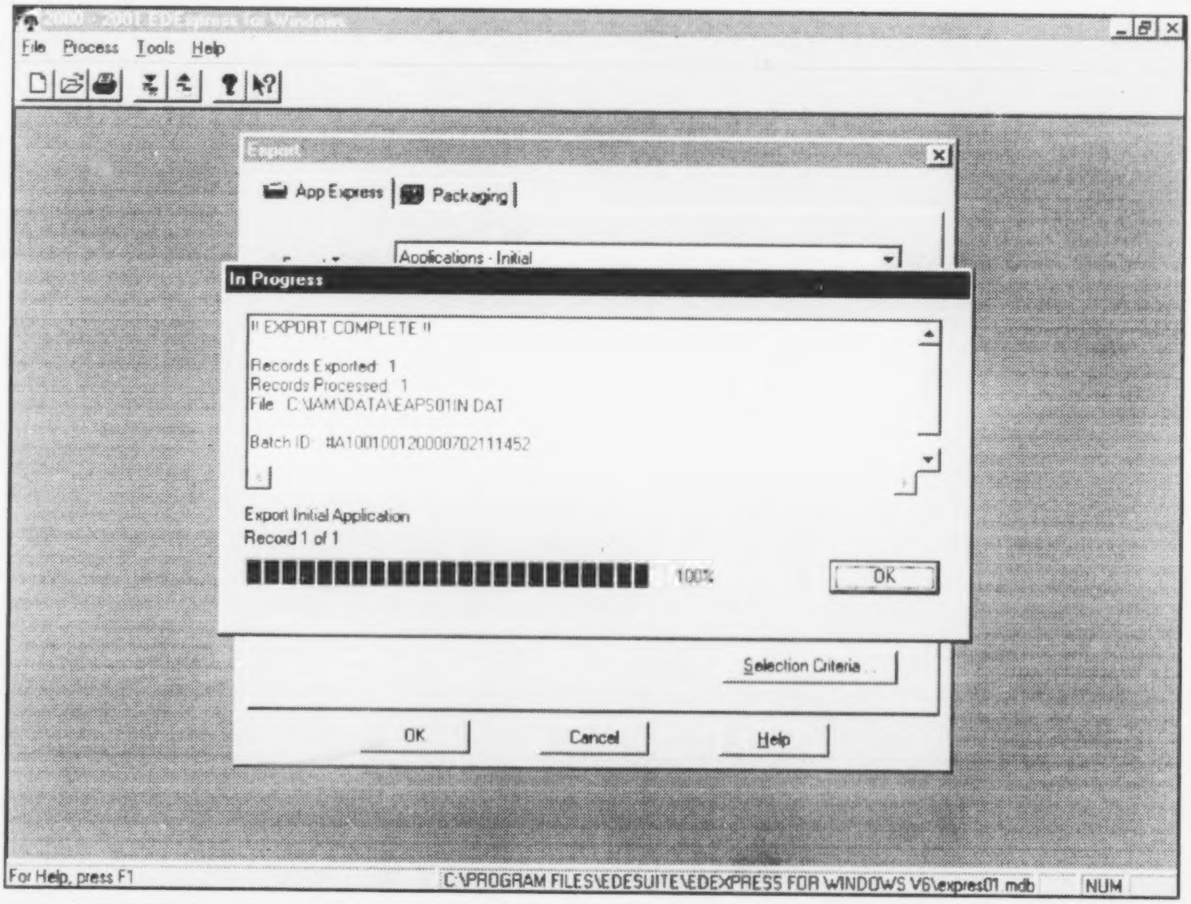
TG ID: 59999

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

The Export Statistics box displays the Batch ID (see Batch ID on next page), total number of records exported, records processed, and the batch file name (see Message Classes listed on next page).

Reminder: You still need to transmit the batch through Edconn32 or other telecommunication software.

Click ***OK***.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Export
App Express
Packaging
Applications - Initial
In Progress
OK
Selection Criteria...
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

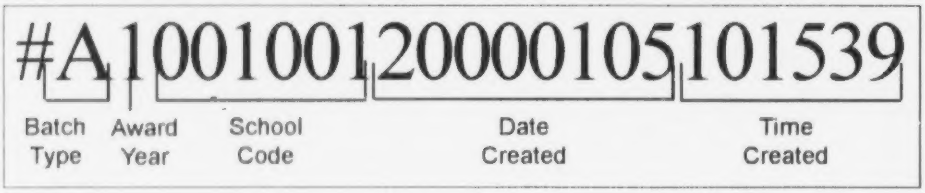
```
!! EXPORT COMPLETE !!

Records Exported: 1
Records Processed: 1
File: C:\IAM\DATA\EAPS01IN.DAT

Batch ID: #A10010012000070211452
```

Export Initial Application
Record 1 of 1
100%

Batch Ids



Batch IDs are a means of tracking student records within a batch. The first letter of a batch ID identifies the type of data contained in the batch. In the example above, the letter "A" identifies this data as an Electronic Application that has been sent. (Refer to the table on the next page.)

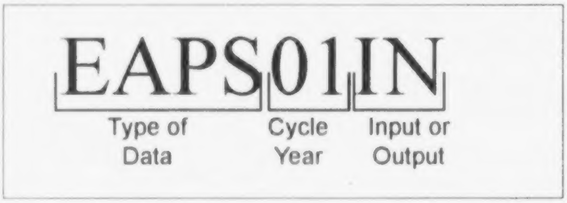
Next, the first number of the Batch ID refers to the award year cycle to which the batch applies. In this example, the number will always be 1 because the batch applies to the 2000-2001 award year cycle.

The following six digits are the school code for the assumed institution assigned in Setup. Here the code for our assumed institution is 001001.

The next eight digits refer to the date (four-digit year, month, and day) this batch was created. This batch was created on January 5, 2000.

The last six digits refer to the time (hours, minutes, and seconds) the batch was created. This batch was created at 10:15 and 39 seconds.

Message Classes



A message class is a filename that identifies the data contained within a file. The first four characters of the message class identify the type of data. In the example above, EAPS identifies an Exported Initial Application. (Note: message class characters are not always acronyms.) The second two numbers refer to the award year cycle. In this example, the award year cycle is 01.

The last two characters indicate input or output data. "IN" refers to what is sent in by the user for the Title IV contractor to retrieve. "OP" refers to what the Title IV contractor has put back on the network for the user to retrieve.

Message Class	***Batch Type***	***Data Description***	***Sent or Received by User***
CONNCTOP	n/a	Connectivity Test Message	Received
CORR01IN	C	Electronic Corrections and Duplicates	Sent
EAPR01OP	A	Electronic Application ISIRs Errors (Rejects)	Received
EAPS01IN	A	Electronic Applications	Sent
EAPS01OP	A	Electronic Application ISIRs	Received
EREP01OP	n/a	Renewal Errors (RAD)	Received
ESFN01OP	K	State Agency Electronic ISIRs, Full-Non-Residents	Received
ESFR01OP	L	State Agency Electronic ISIRs, Full-Residents	Received
FDRE01OP	F	Rejected FDR Request	Received
FDRF01OP	F	Processed FDRs, Full Data Format	Received
FDRS01IN	F	FDR Requests	Sent
FDRU01OP	F	Unfulfilled FDRs after 30 Days	Received
PMESSAGE	n/a	Network Messages	Received
RADD01IN	n/a	Renewal Requests (RAD)	Sent
RADD01OP	R	Renewal Applications (user requested RADs)	Received
RAPR01OP	B	Renewal Application Rejects	Received
REAP01IN	B	Renewal Submissions (RAPP into CPS)	Sent
REAP01OP	B	Electronic Renewal Applications (RAPP)	Received
SARA01OP	E	Electronic Automatic ISIRs	Received
SARA01TS	n/a	Electronic SAR Test Mode	Received
SARE01OP	C	Electronic Correction/Duplicate Errors	Received
SARR01OP	C	Electronic Correction/Duplicate ISIRs	Received
SIGA01OP	S or Y	Signature File	Received
SIGS01IN	S	Signature File	Sent
SYGO01OP	Z or Y	System Generated	Received
YTDF01OP	K	State Agency YTD ISIR Full/Non-Resident	Received
YTDN01OP	L	State Agency YTD ISIR Full/Resident	Received
YTDO01OP	Y	Year to Date ISIRs	Received

Browsing the Batch Activity Database

*Select **Tools/Browse/ App Express** from the menu bar*

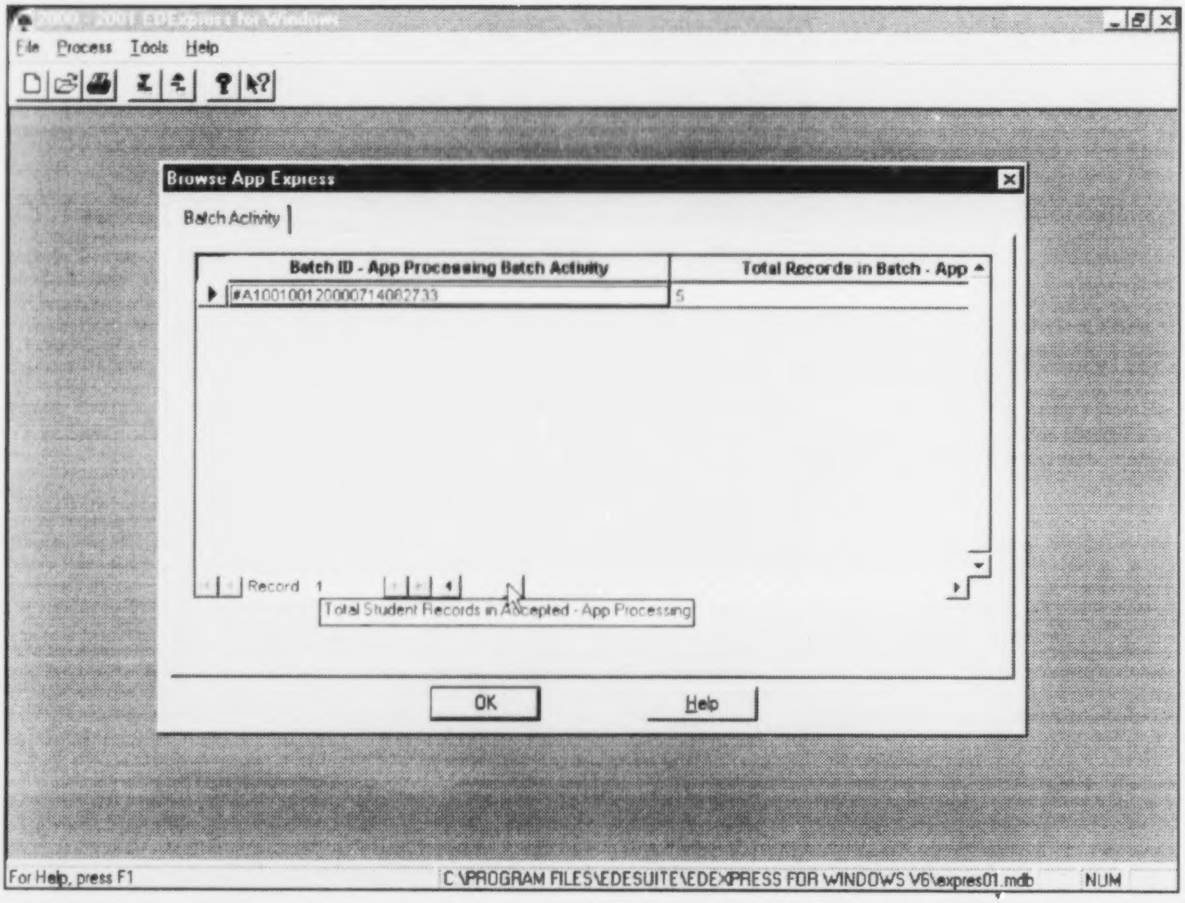
Click the down arrow on the scroll bar to view more of the records

*Click **OK** when you are finished browsing through the records*

Each time you create an export file, an import file, or regenerate an existing batch, an entry is made on the Batch Activity Database. The batch activity browse tool helps you track the batches you have created and received, by allowing you to view the records in the Batch Activity Database.

Each row in the database represents a batch and includes such information as the batch ID, the number of records included, and the user who created it.

Bubble help text has been added to the horizontal scroll bar to indicate field location.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Browse App Express
Batch Activity
Record 1
OK
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Batch ID - App Processing Batch Activity	Total Records in Batch - App
#A100100120000714082733	5

Total Student Records in Accepted - App Processing

Printing a List Using a Query

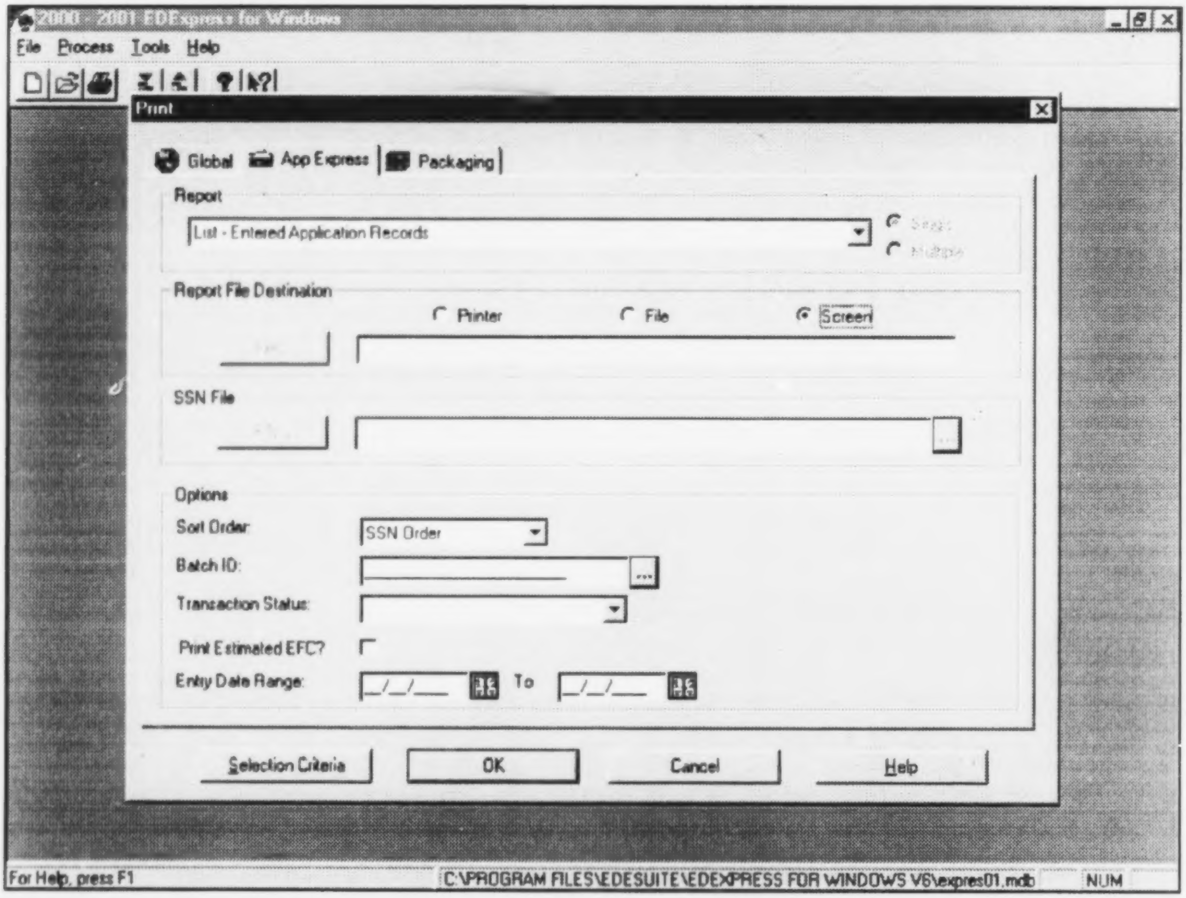
While working with EDE data, you may find you need to know which students are included in a batch of application records. There are several types of lists you can generate from Application Processing. In this example, we create a list of entered applications that have a dependency status of D (Dependent).

*Select **File/Print/App Express** from the menu bar.*

*Click the down arrow in the **Report** box to display a list of items you can print.*

*Select **List – Entered Application Records**.*

*Click **Printer, File, or Screen** as the output destination.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Report: List - Entered Application Records

Report File Destination: ○ Printer ○ File ● Screen

SSN File:

Options

Sort Order: SSN Order

Batch ID:

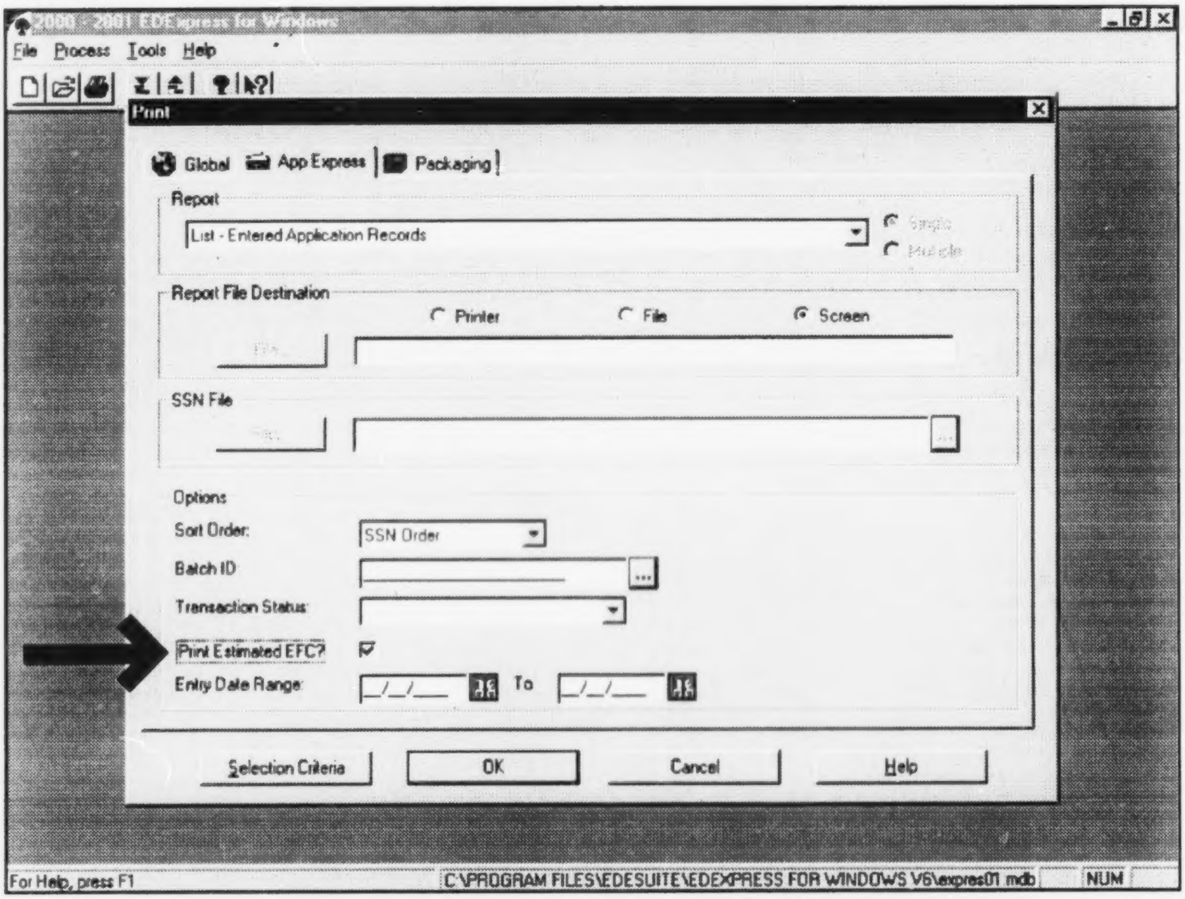
Transaction Status:

Print Estimated EFC? ☐

Entry Date Range: _/_/__ To _/_/__

Click on ***Print Estimated EFC?***

In the Options portion of the screen you can also choose sort order, batch ID, transaction status, and whether or not to print the estimated EFC. Here, we will choose to print the estimated EFC.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help

Report: List - Entered Application Records ○ Single ○ Multiple

Report File Destination: ○ Printer ○ File ● Screen

SSN File:

Options

Sort Order: SSN Order

Batch ID:

Transaction Status:

Print Estimated EFC? ☑

Entry Date Range: _/_/__ To _/_/__

For Help, press F1 | C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb | NUM

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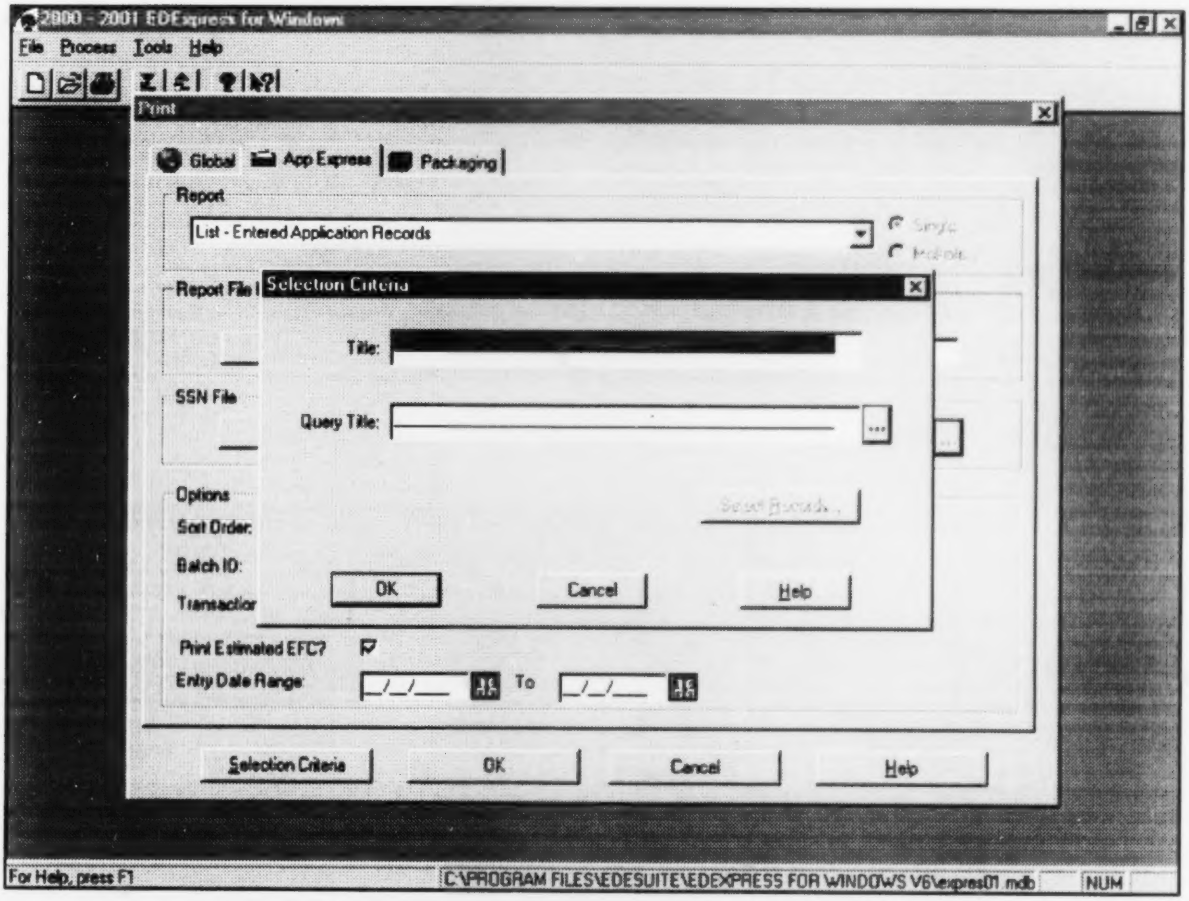
Selection criteria can be used when you want to select a particular group of student records to print. To do this, we access the query function.

*Click on the **Selection Criteria** button.*

*Click on the **ellipsis** button to access Query.*



Report: List - Entered Application Records

Title:

Query Title:

Print Estimated EFC? ☑

Entry Date Range: _/_/__ To _/_/__

For Help, press F1

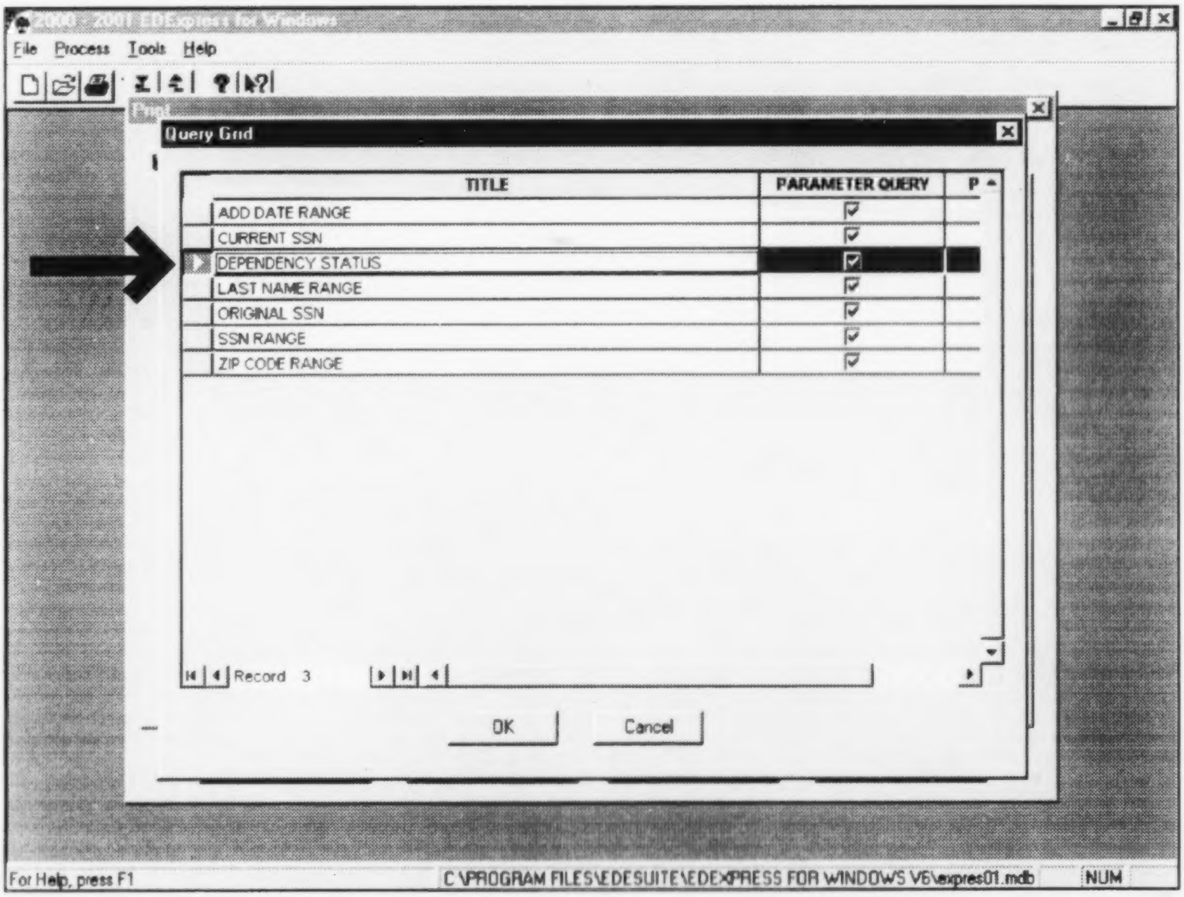
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Single
Multiple
Report File
SSN File
Selection Criteria
...
Select Records...
OK
Cancel
Help
Options
Sort Order:
Batch ID:
Transaction
Selection Criteria
OK
Cancel
Help
NUM

BEST COPY AVAILABLE

The query grid shows a list of all the queries in the database. In this example, we will print the entered application records that have a dependent status. To do this, we will select the query for ***Dependency Status.***

EDExpress comes with a set of predefined queries that are commonly used in App Express, Packaging, Direct Loan, and Pell. Whenever the Selection Criteria option is available in EDExpress (for example, in Print and Export), you can use these queries to identify groups of records.

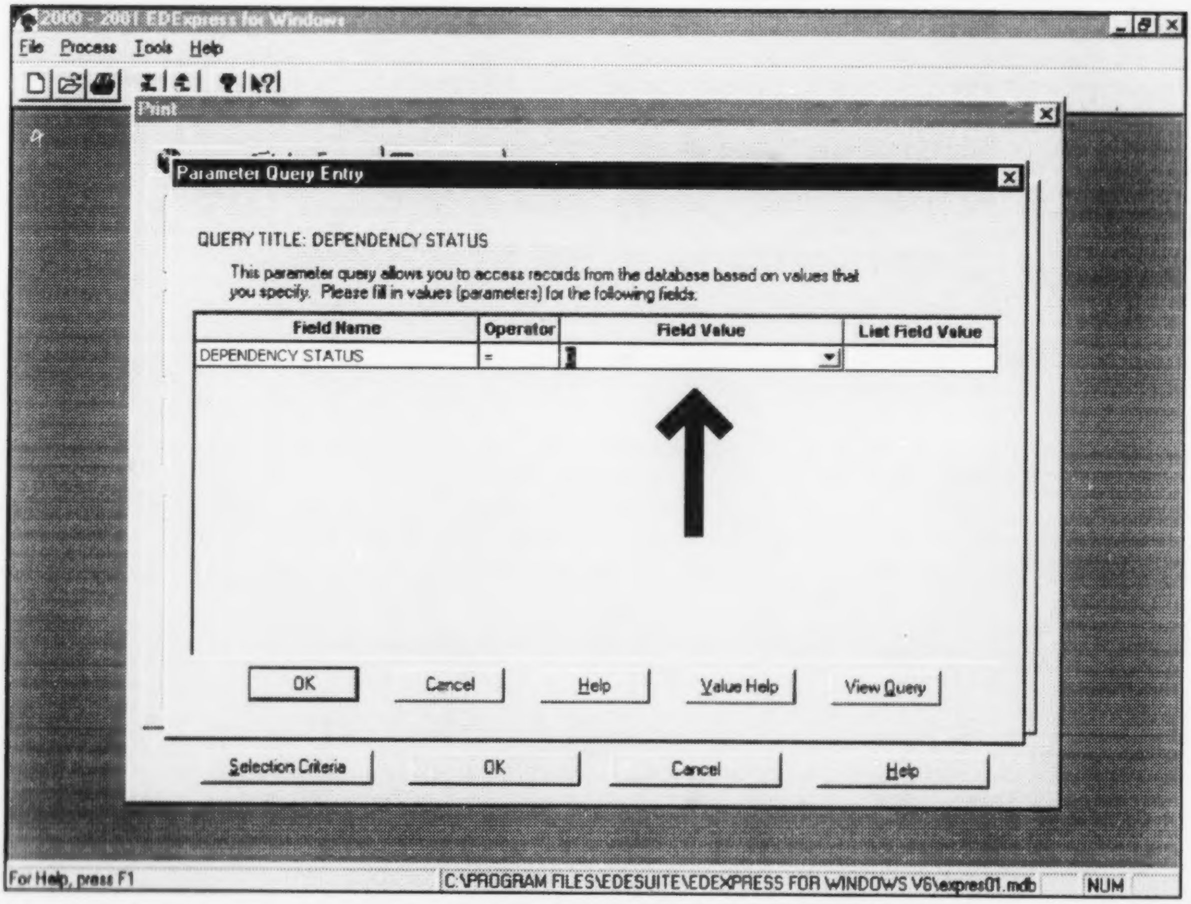

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Query Grid
Record 3
OK
Cancel
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

TITLE	PARAMETER QUERY	P
ADD DATE RANGE	☑	
CURRENT SSN	☑	
DEPENDENCY STATUS	☑	
LAST NAME RANGE	☑	
ORIGINAL SSN	☑	
SSN RANGE	☑	
ZIP CODE RANGE	☑	

Predefined queries allow you to enter a value or values that will be used to select the data.

*Select **D** from the drop-down menu in **Field Value.***

*Click **OK**.*



2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Parameter Query Entry
OK
Cancel
Help
Value Help
View Query
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

QUERY TITLE: DEPENDENCY STATUS

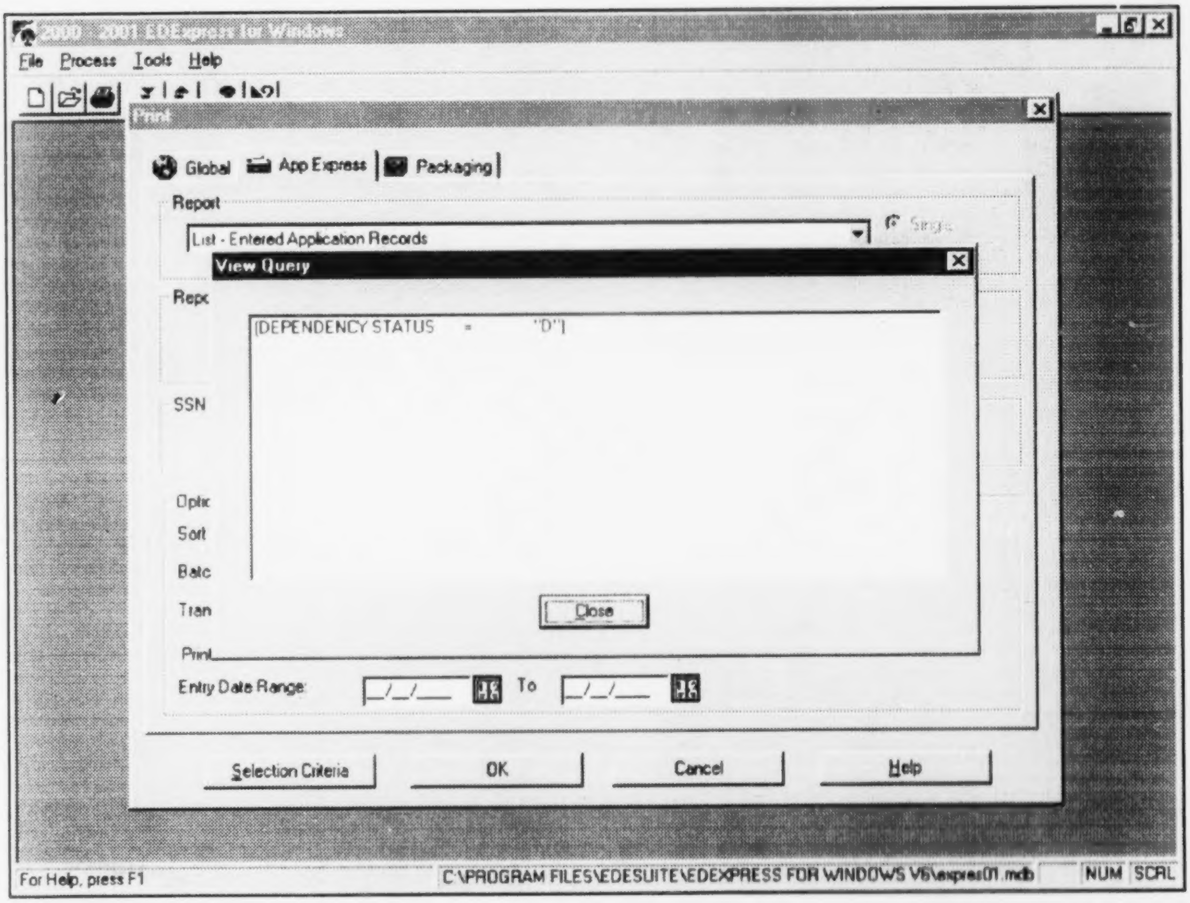
This parameter query allows you to access records from the database based on values that you specify. Please fill in values (parameters) for the following fields.

Field Name	Operator	Field Value	List Field Value
DEPENDENCY STATUS	=		

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Click ***Close***

The query statement is displayed. All students with dependency status D will be included on the list.

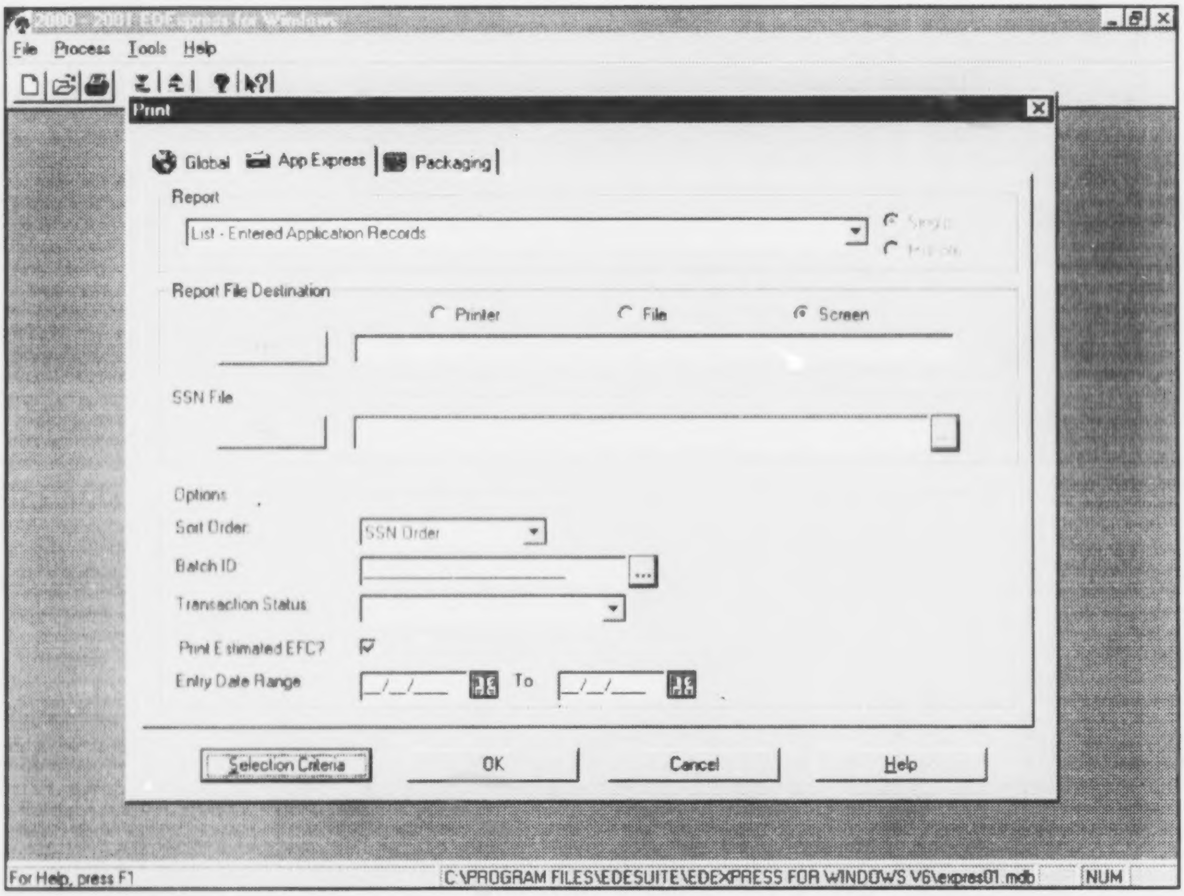


2000 - 2001 EDExpress for Windows
File Process Tools Help
Print
Global
App Express
Packaging
Report
List - Entered Application Records
Single
View Query
Repc
SSN
Optic
Sort
Batc
Tran
Print
Entry Date Range:
To
Close
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM
SCRL

(DEPENDENCY STATUS = "D")

The last step is to print the list

*Click **OK** on the Print screen*


2000 - 2001 EDExpress for Windows

Print

Report: List - Entered Application Records (● Single ○ Multiple)

Report File Destination: ○ Printer ○ File ● Screen

SSN File:

Options

Sort Order: SSN Order

Batch ID:

Transaction Status:

Print Estimated EFC? ☑

Entry Date Range: __/__/____ To __/__/____

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

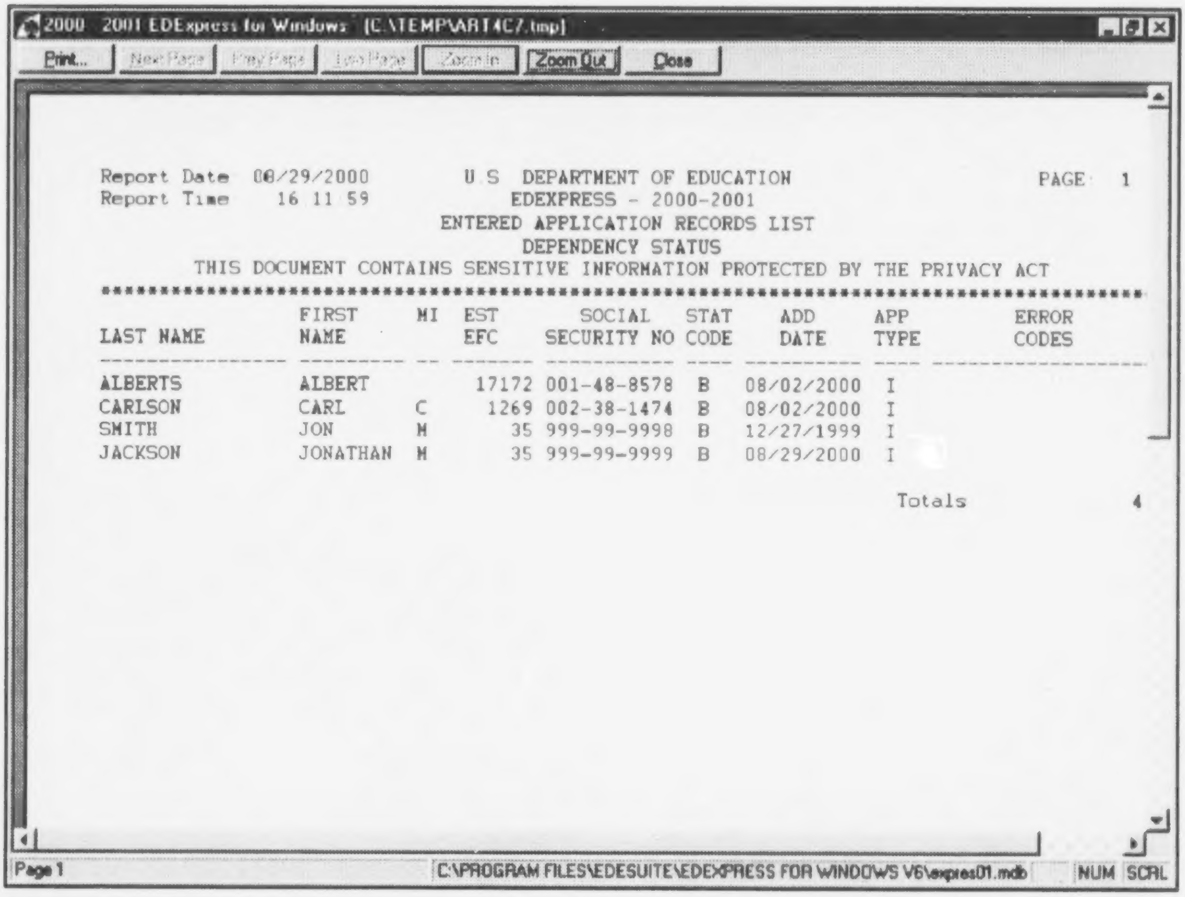
File
Process
Tools
Help
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
NUM

*Click the **Close** button when you have finished viewing the information.*

If you print to the screen, your cursor will change to a magnifying glass. Click anywhere on the screen to zoom in and see the completed report.

The completed report shows the four entered records with estimated EFCs.

Tip: To print the report, click the Print button.


2000 2001 EDExpress for Windows [C:\TEMP\ART4C7.tmp]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM
SCRL

```
Report Date  08/29/2000        U S  DEPARTMENT OF EDUCATION                    PAGE   1
Report Time     16 11 59            EDEXPRESS - 2000-2001
                              ENTERED APPLICATION RECORDS LIST
                                     DEPENDENCY STATUS
        THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
***************************************************************************************
                  FIRST     MI  EST       SOCIAL    STAT    ADD      APP         ERROR
LAST NAME         NAME          EFC    SECURITY NO  CODE    DATE     TYPE        CODES
----------------- --------- -- ------- ----------- ---- ---------- ---- -----------------
ALBERTS           ALBERT          17172 001-48-8578  B   08/02/2000  I
CARLSON           CARL      C      1269 002-38-1474  B   08/02/2000  I
SMITH             JON       M        35 999-99-9998  B   12/27/1999  I
JACKSON           JONATHAN  M        35 999-99-9999  B   08/29/2000  I

                                                               Totals            4
```

Creating a New Query from a Predefined Query

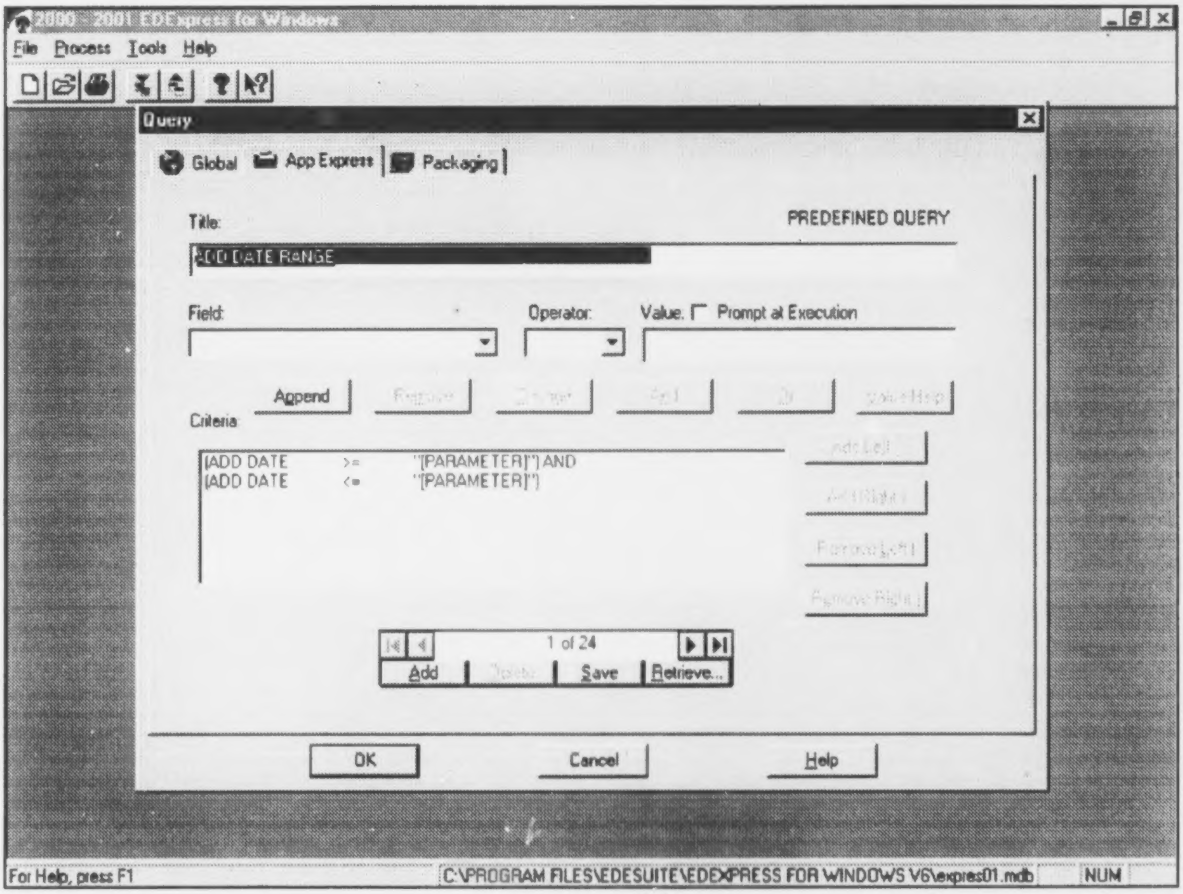
During the last topic, printing a list, we introduced you to predefined queries. Although you cannot change a predefined query, you can use them as templates to create your own queries.

When you open the Query dialog box for the first time, you'll see that the predefined queries are stored as the first set of records in the Query database. You'll know a query is predefined if you see "PREDEFINED QUERY" in the upper right corner of the query dialog box.

*Select **Tools/Query** from the menu bar.*

You can use the arrow buttons to scroll through the predefined queries, or you can click the Retrieve button to see a list of the queries in your database.

*Click **Retrieve**...*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Query
Global
App Express
Packaging
Append
Add Left
Add Right
Remove Left
Remove Right
Add
Delete
Save
Retrieve...
OK
Cancel
Help

Title: ADD DATE RANGE

PREDEFINED QUERY

Field:

Operator:

Value: ☐ Prompt at Execution

Criteria:

```
(ADD DATE        >=        "[PARAMETER]") AND
(ADD DATE        <=        "[PARAMETER]")
```

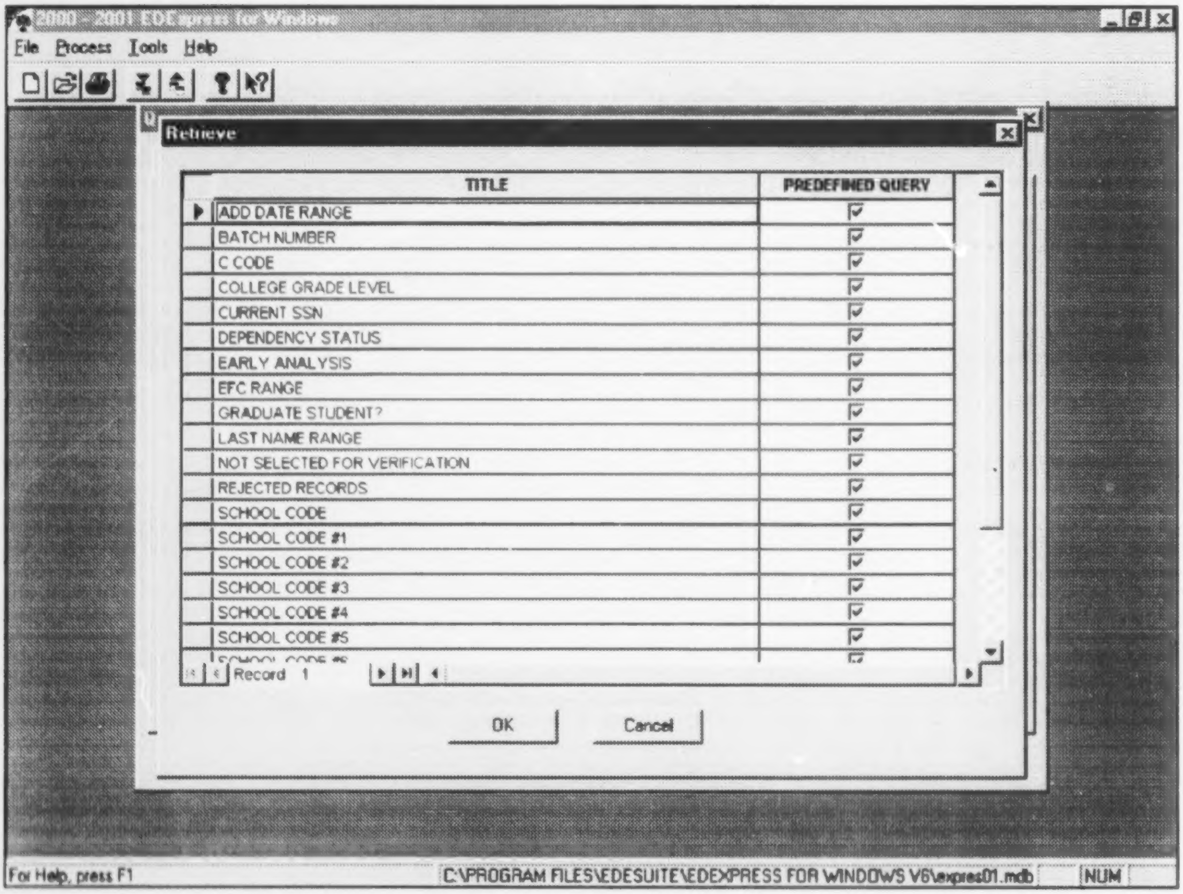
1 of 24

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

A list of the predefined queries in the database is displayed.

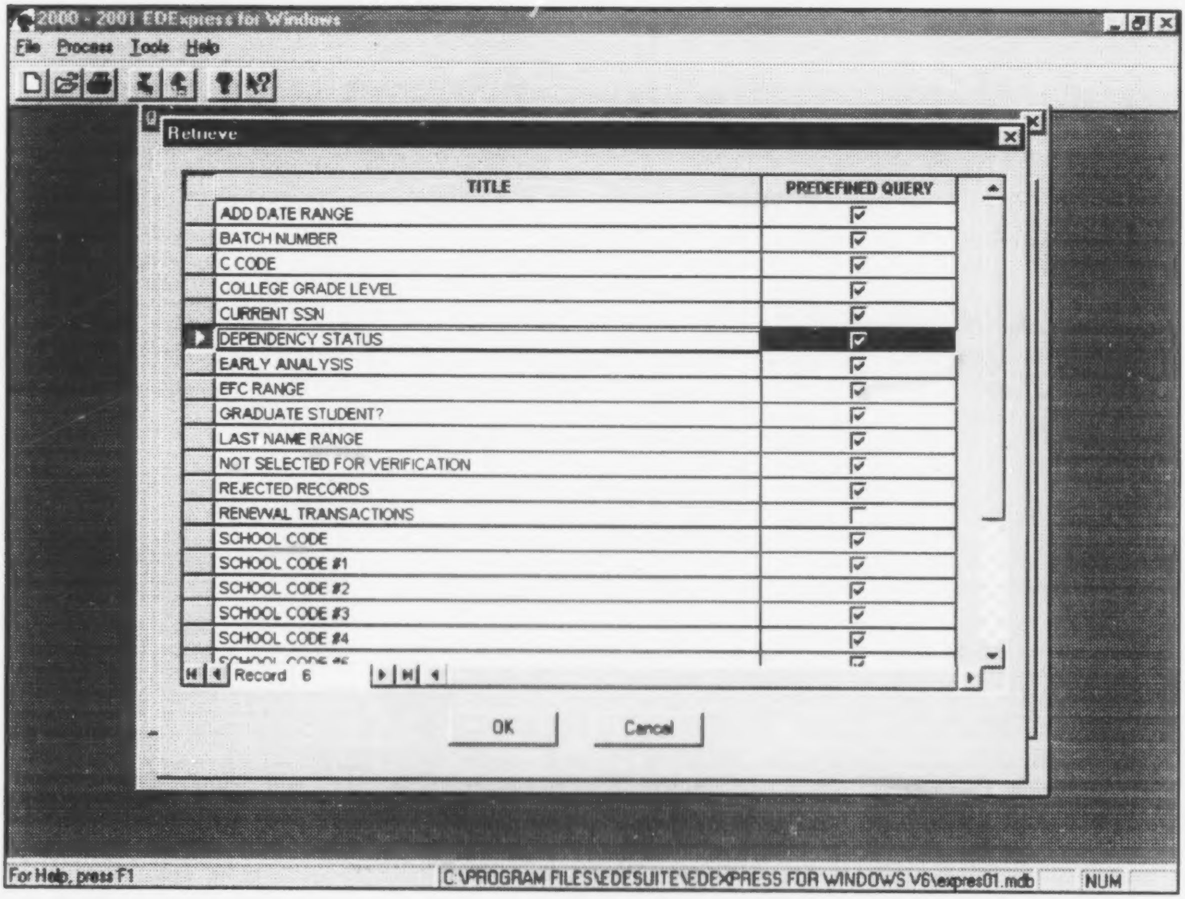

2000 - 2001 EDExpress for Windows
File Process Tools Help
Retrieve
Record 1
OK
Cancel
For Help, press F1
NUM

TITLE	PREDEFINED QUERY
ADD DATE RANGE	☑
BATCH NUMBER	☑
C CODE	☑
COLLEGE GRADE LEVEL	☑
CURRENT SSN	☑
DEPENDENCY STATUS	☑
EARLY ANALYSIS	☑
EFC RANGE	☑
GRADUATE STUDENT?	☑
LAST NAME RANGE	☑
NOT SELECTED FOR VERIFICATION	☑
REJECTED RECORDS	☑
SCHOOL CODE	☑
SCHOOL CODE #1	☑
SCHOOL CODE #2	☑
SCHOOL CODE #3	☑
SCHOOL CODE #4	☑
SCHOOL CODE #5	☑

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

In this example, we will select the query with the title Dependency Status to use as a template.

*Click **OK** to continue.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Retrieve
OK
Cancel
For Help, press F1
NUM

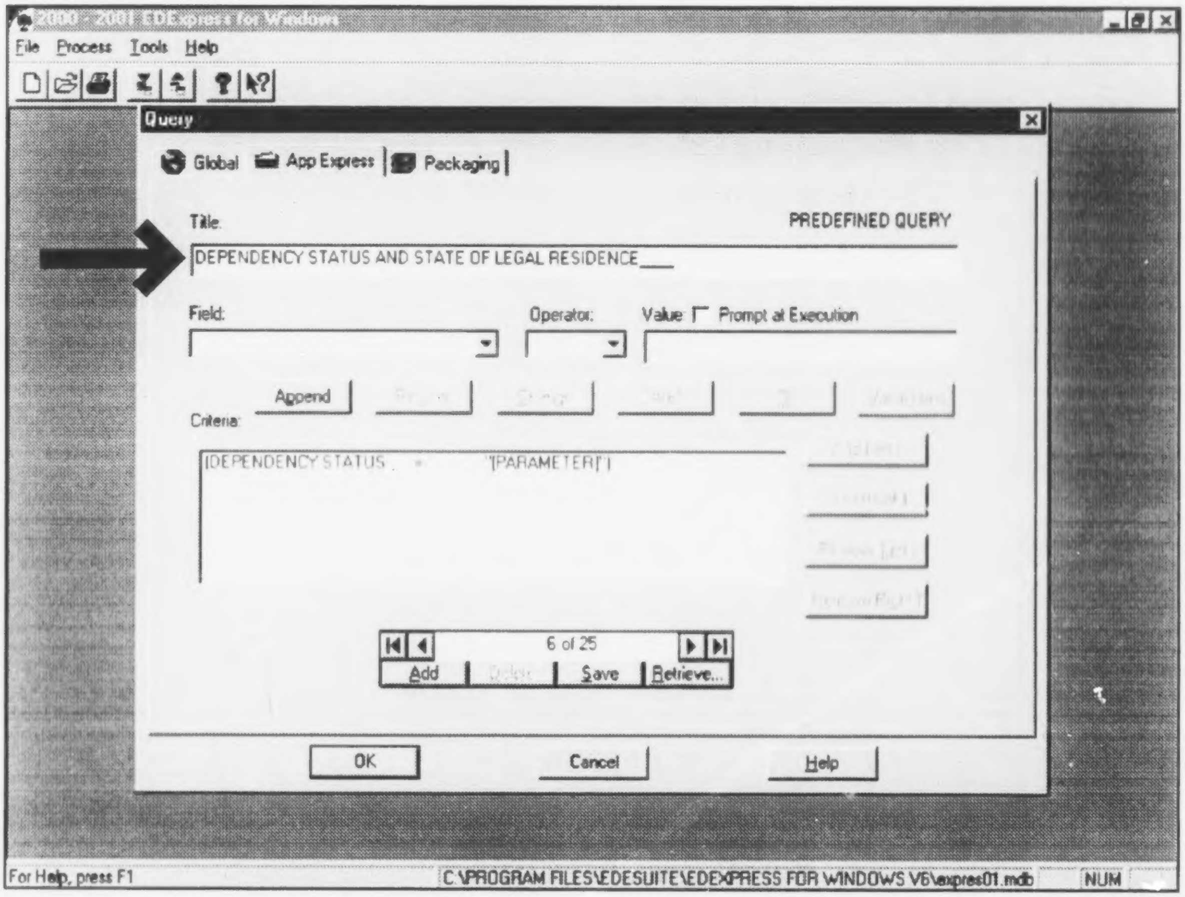
TITLE	PREDEFINED QUERY
ADD DATE RANGE	☑
BATCH NUMBER	☑
C CODE	☑
COLLEGE GRADE LEVEL	☑
CURRENT SSN	☑
DEPENDENCY STATUS	☑
EARLY ANALYSIS	☑
EFC RANGE	☑
GRADUATE STUDENT?	☑
LAST NAME RANGE	☑
NOT SELECTED FOR VERIFICATION	☑
REJECTED RECORDS	☑
RENEWAL TRANSACTIONS	☐
SCHOOL CODE	☑
SCHOOL CODE #1	☑
SCHOOL CODE #2	☑
SCHOOL CODE #3	☑
SCHOOL CODE #4	☑

Record 6

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

*Enter **And State of Legal Residence** in the title field*

In order to create a new query we must first enter a new title. In this example we will create a query for dependency status and state of legal residence.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Query
Global
App Express
Packaging
PREDEFINED QUERY
Operator:
Append
Add
Save
Retrieve...
OK
Cancel
Help

Title: DEPENDENCY STATUS AND STATE OF LEGAL RESIDENCE

Field:

Value: ☐ Prompt at Execution

Criteria: (DEPENDENCY STATUS = '[PARAMETER]')

6 of 25

For Help, press F1

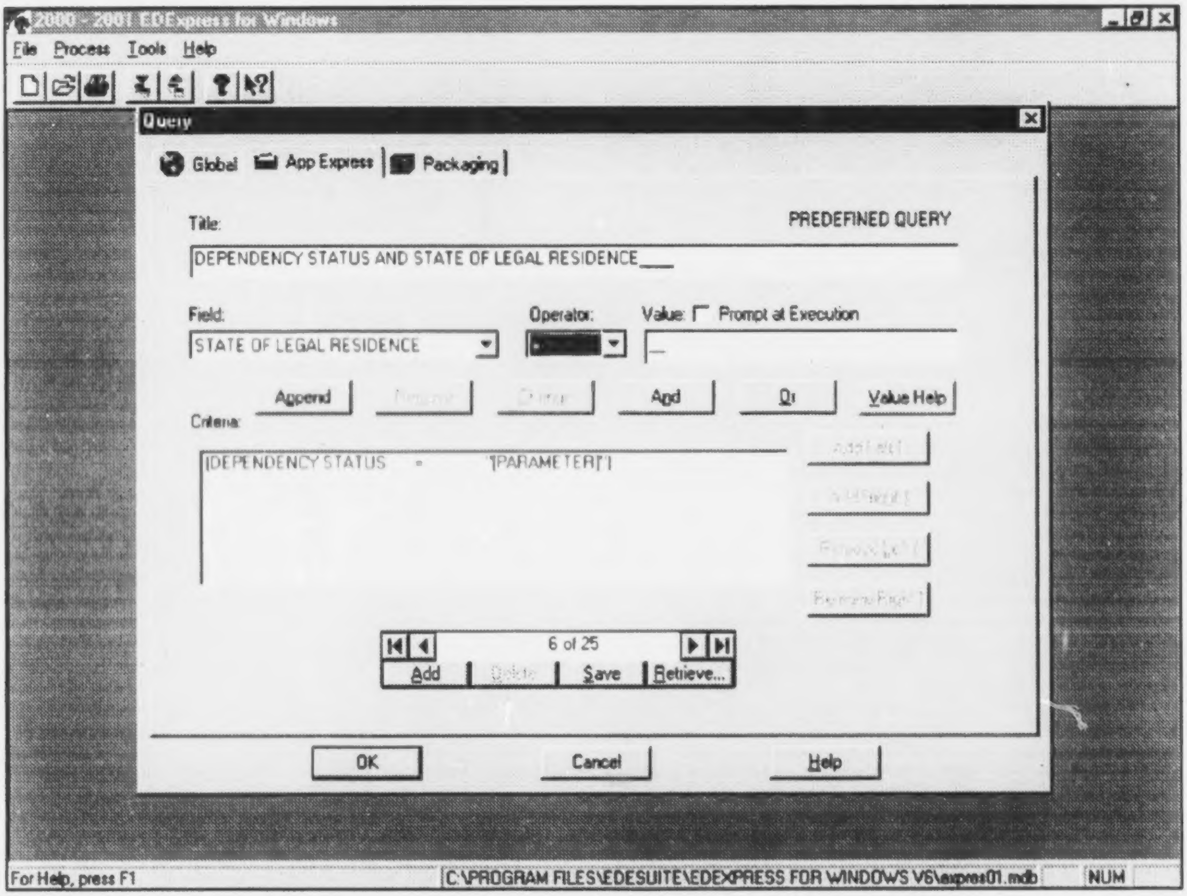
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

The next step is to add the new criteria to the existing query. The new criteria is the state of legal residence.

*Click the drop down arrow in Field and select **State of Legal Residence**.*

Select = as the operator.



2000 - 2001 EDExpress for Windows
File Process Tools Help
Query
Global
App Express
Packaging
Append
And
Or
Value Help
Add
Save
Retrieve...
OK
Cancel
Help

PREDEFINED QUERY

Title: DEPENDENCY STATUS AND STATE OF LEGAL RESIDENCE

Field: STATE OF LEGAL RESIDENCE

Operator:

Value: ☐ Prompt at Execution

Criteria: (DEPENDENCY STATUS = '[PARAMETER]')

6 of 25

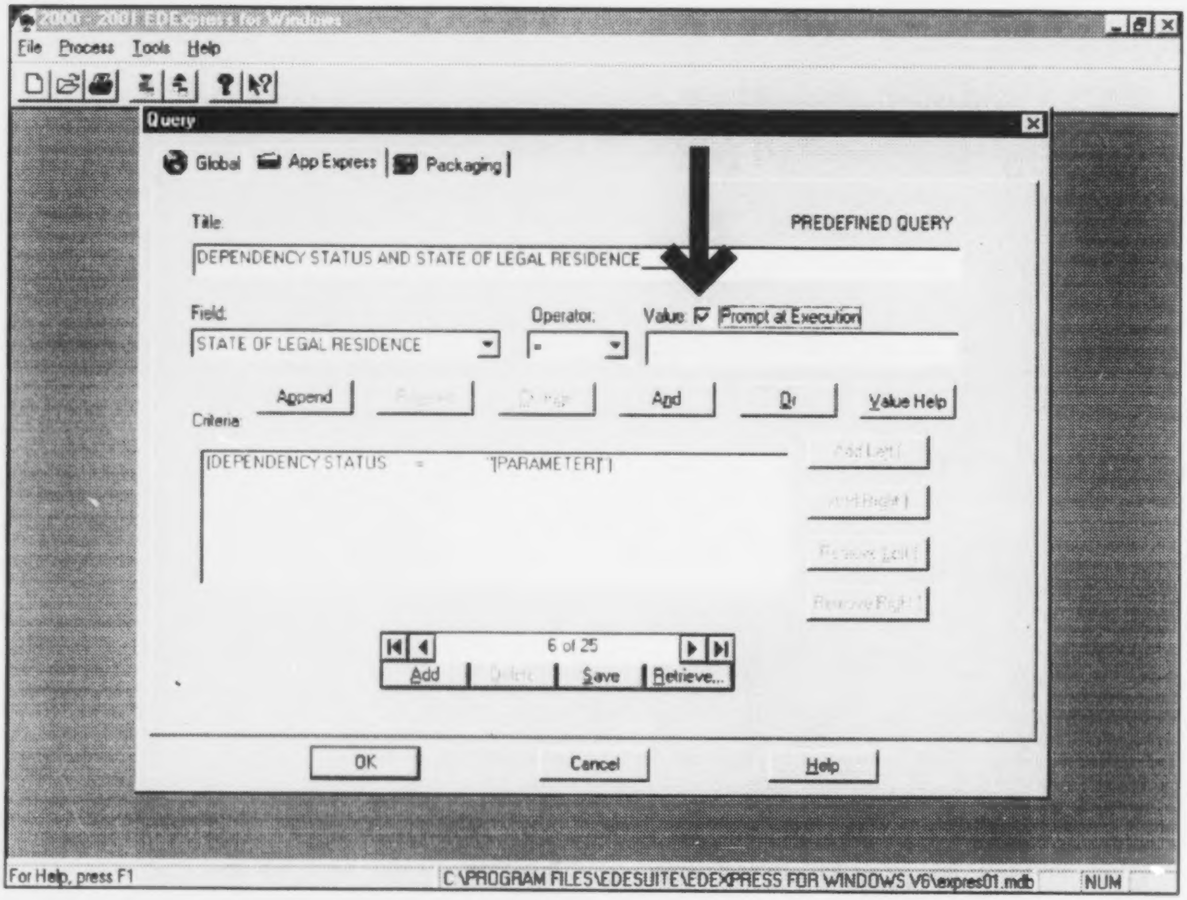
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb

NUM

Click the ***Prompt at Execution*** *checkbox*

Click the Prompt at Execution box to instruct the system to ask you which state to use each time you execute the query.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Query
Global
App Express
Packaging
PREDEFINED QUERY
Append
And
Or
Value Help
Add
Save
Retrieve...
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Title: DEPENDENCY STATUS AND STATE OF LEGAL RESIDENCE

Field: STATE OF LEGAL RESIDENCE

Operator: =

Value: ☑ Prompt at Execution

Criteria: (DEPENDENCY STATUS = "[PARAMETER]")

6 of 25

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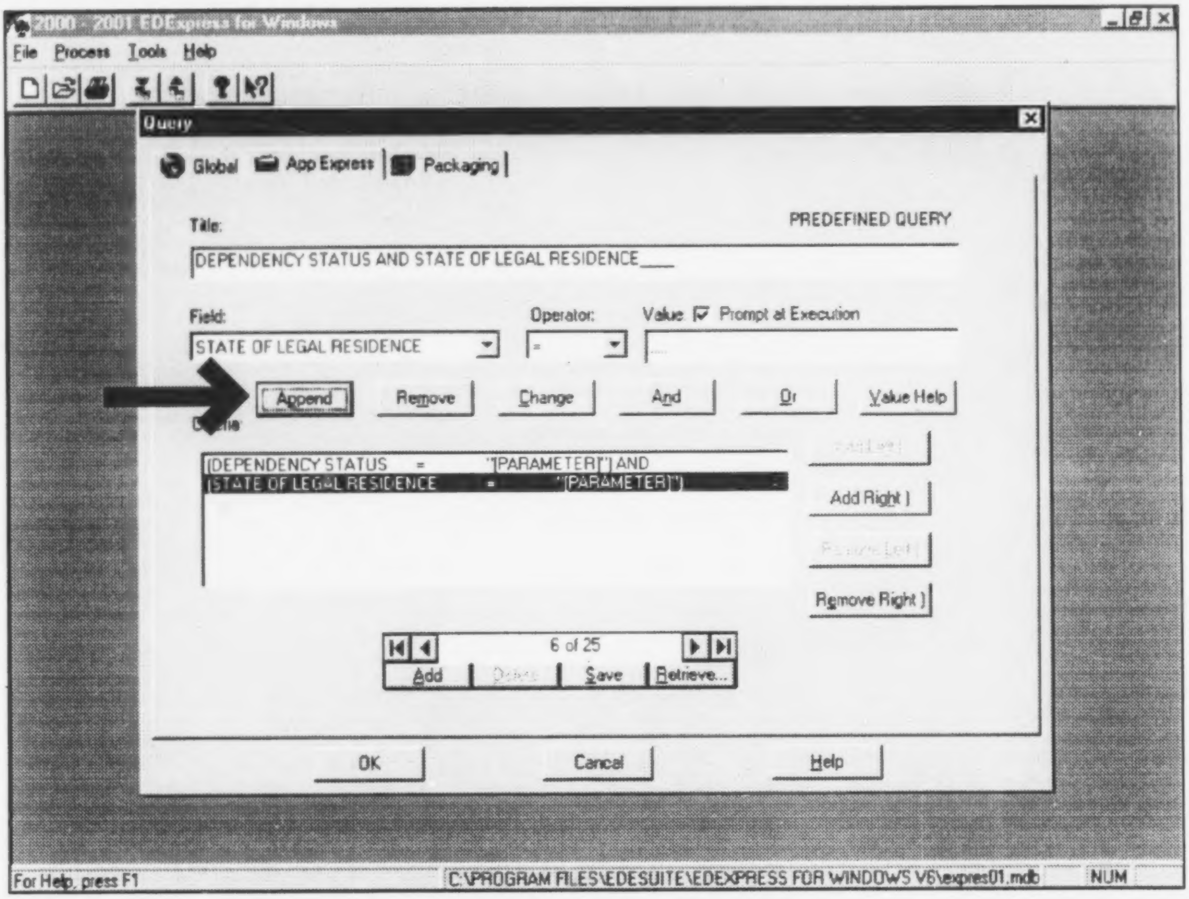
To finish the query you must Append the query and save it.

Click on the Append button to add the new information in the criteria field.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Query
Global
App Express
Packaging
PREDEFINED QUERY
Append
Remove
Change
And
Or
Value Help
Criteria
Add Left (
Add Right)
Remove Left (
Remove Right)
6 of 25
Add
Delete
Save
Retrieve...
OK
Cancel
Help
For Help, press F1
NUM

Title: DEPENDENCY STATUS AND STATE OF LEGAL RESIDENCE

Field: STATE OF LEGAL RESIDENCE

Operator: =

Value ☑ Prompt at Execution

```
(DEPENDENCY STATUS        =          "[PARAMETER]") AND
(STATE OF LEGAL RESIDENCE       =          "[PARAMETER]")
```

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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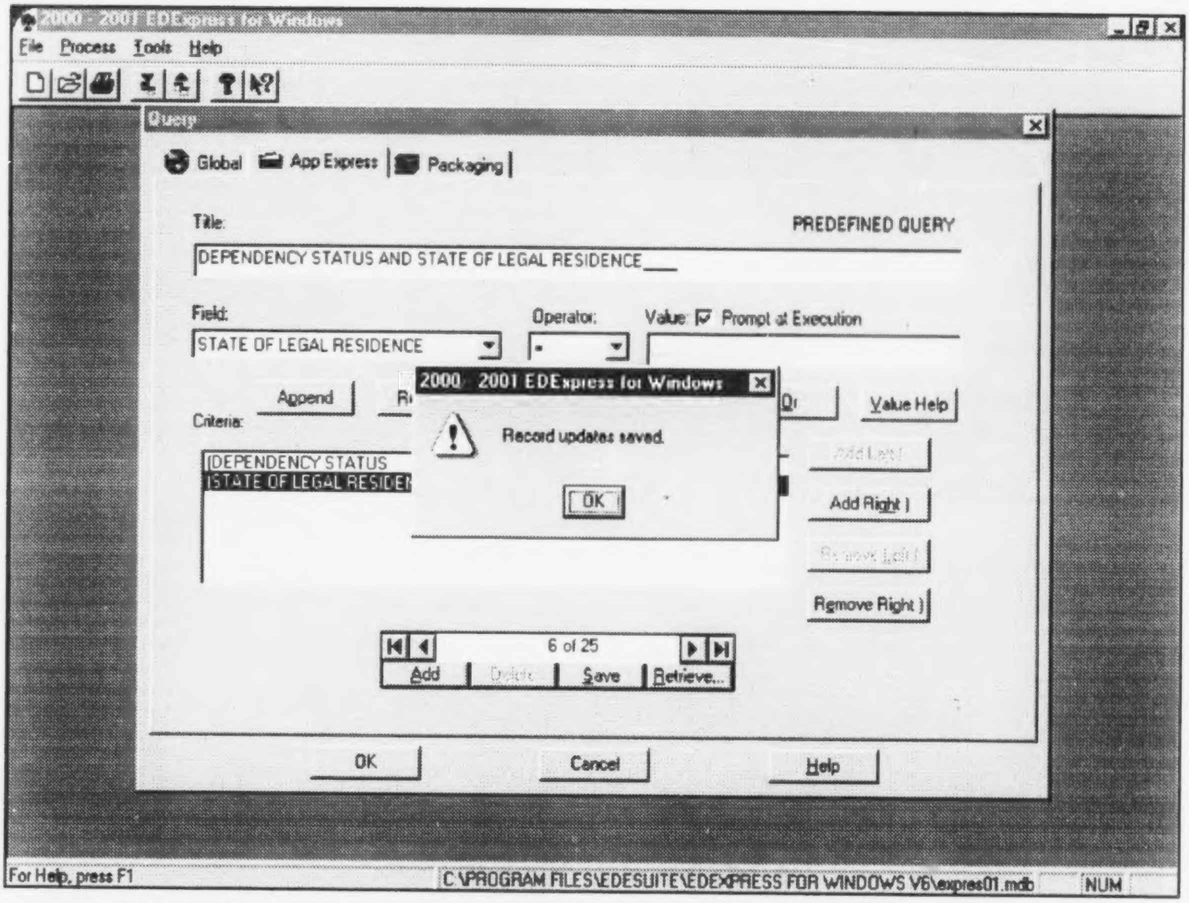
*Click **Save** to save the new query.*

EDExpress displays a pop-up window that indicates the record updates were saved.

*Click **OK**.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Query
Global App Express Packaging
Append
Value Help
Add Left
Add Right
Remove Left
Remove Right
Add Delete Save Retrieve...
OK Cancel Help

Title: DEPENDENCY STATUS AND STATE OF LEGAL RESIDENCE

PREDEFINED QUERY

Field: STATE OF LEGAL RESIDENCE

Operator: =

Value: ☑ Prompt at Execution

Criteria:
(DEPENDENCY STATUS
(STATE OF LEGAL RESIDEN

2000 - 2001 EDExpress for Windows

Record updates saved.

OK

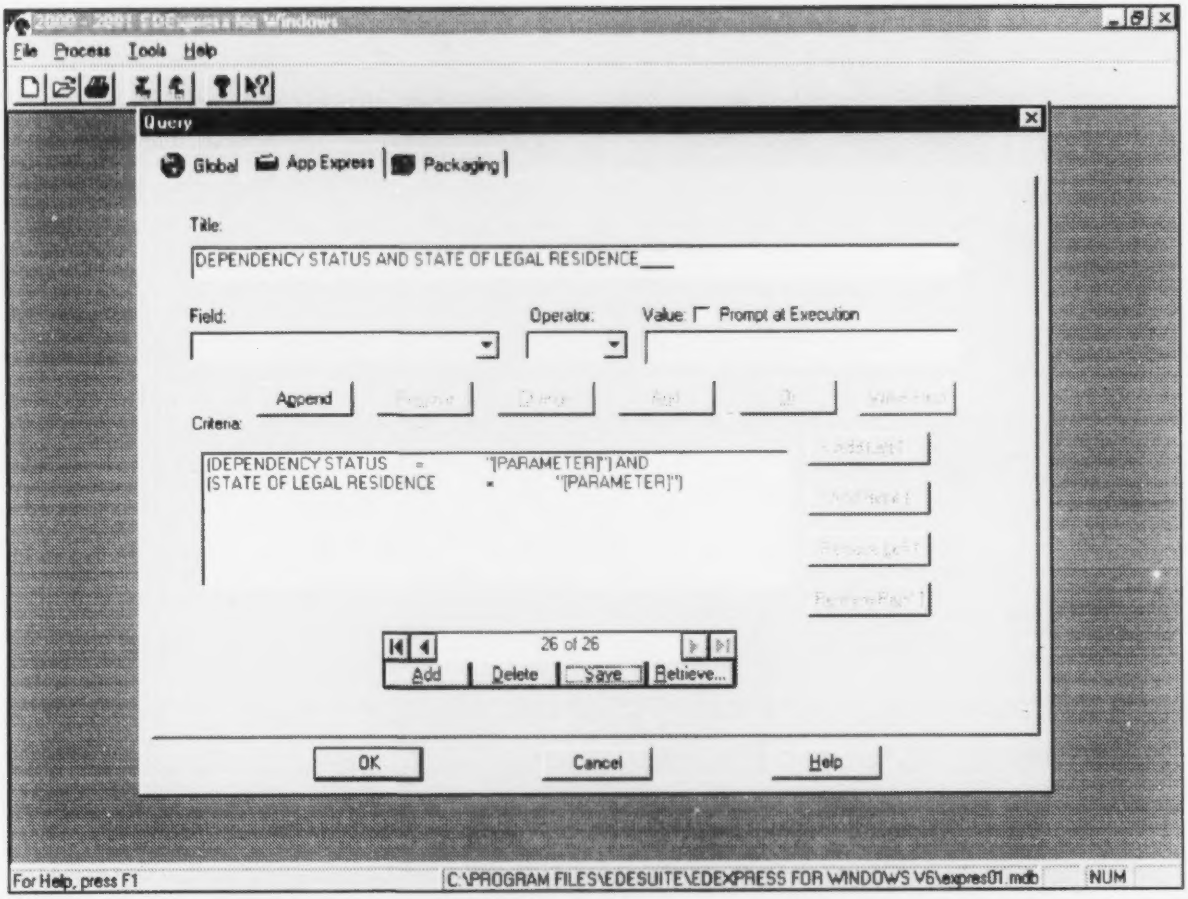
6 of 25

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

The new query has been saved and has been added to the database.


File
Process
Tools
Help
Query
Global
App Express
Packaging
Append
Add
Delete
Save
Retrieve...
OK
Cancel
Help
For Help, press F1
NUM

Title: DEPENDENCY STATUS AND STATE OF LEGAL RESIDENCE

Field:

Operator:

Value: ☐ Prompt at Execution

Criteria:

```
(DEPENDENCY STATUS      =          "[PARAMETER]") AND
(STATE OF LEGAL RESIDENCE        =          "[PARAMETER]")
```

26 of 26

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Lesson 2 Exercise

Scenario:

Sam Adams works in a financial aid office. It is a very large state school and they receive large volumes of applications. Today has been exceptionally busy, and Sam wants to export batches of initial FAFSA records. After he completes the export, he needs to record the batches in his export log (found in Appendix B), and then print a list of the batches.

Exercise Instructions:

The tasks for this exercised are outlined below. You will complete the tasks and answer questions that pertain to those tasks. **Read the tasks AND the questions before you begin the exercise! Answers to some of the questions may be a part of the task or involve a computer response.**

Sam will use the steps outlined below to export the batch:

Step	Action
1	Select **File/Export** from the menu bar.
2	Click on the **App Express** tab.
3	Click the **down arrow** in the **Export Type** text box to display a list of record types to export.
4	Click on **Applications - Initial**.
5	Click **OK** to export the data. The Export Statistics box displays the batch ID, total number of records exported, records processed, and the batch file name.

Because it was such a busy day, Sam wants to be sure that he exported the correct batches.

1. What message class should the batch Sam exported have?

2. Which characters in the batch ID indicate the type of batch?

3. How many records were successfully exported in the batch?

4. What must the status code be on a record to transmit it?

Lesson 2 Exercise, continued

Next, Sam needs to browse the batch activity database to record the batches that he exported in his export log. The following table outlines the steps used to browse the batch activity database:

Step	Action
1	Select **Tools/Browse/App Express** from the menu bar. The browse batch activity database screen displays.
2	Click the **down arrow** on the scroll bar to view more of the records.
3	Click **OK** when you are finished browsing the records.

Later in the day, the FAO asks Sam to print a list of all the students included in a batch of application records that he exported yesterday. Print the list using the following steps:

Step	Action
1	Select **File/Print/App Express** from the menu bar.
2	Click the **down arrow** in the Report field to display a list of items you can print.
3	Select **List - Entered Application Records**.
4	Click **Printer, File**, or **Screen** as the output destination.
5	Click on the **Print Estimated EFC?** field to print the estimated EFC.
6	On the Print screen, click **OK**. The Entered Applications Record List displays.
7	Click **Close** when you are finished viewing the report.

1. How many students are on the list?

2. What is the status code for each student on the list?

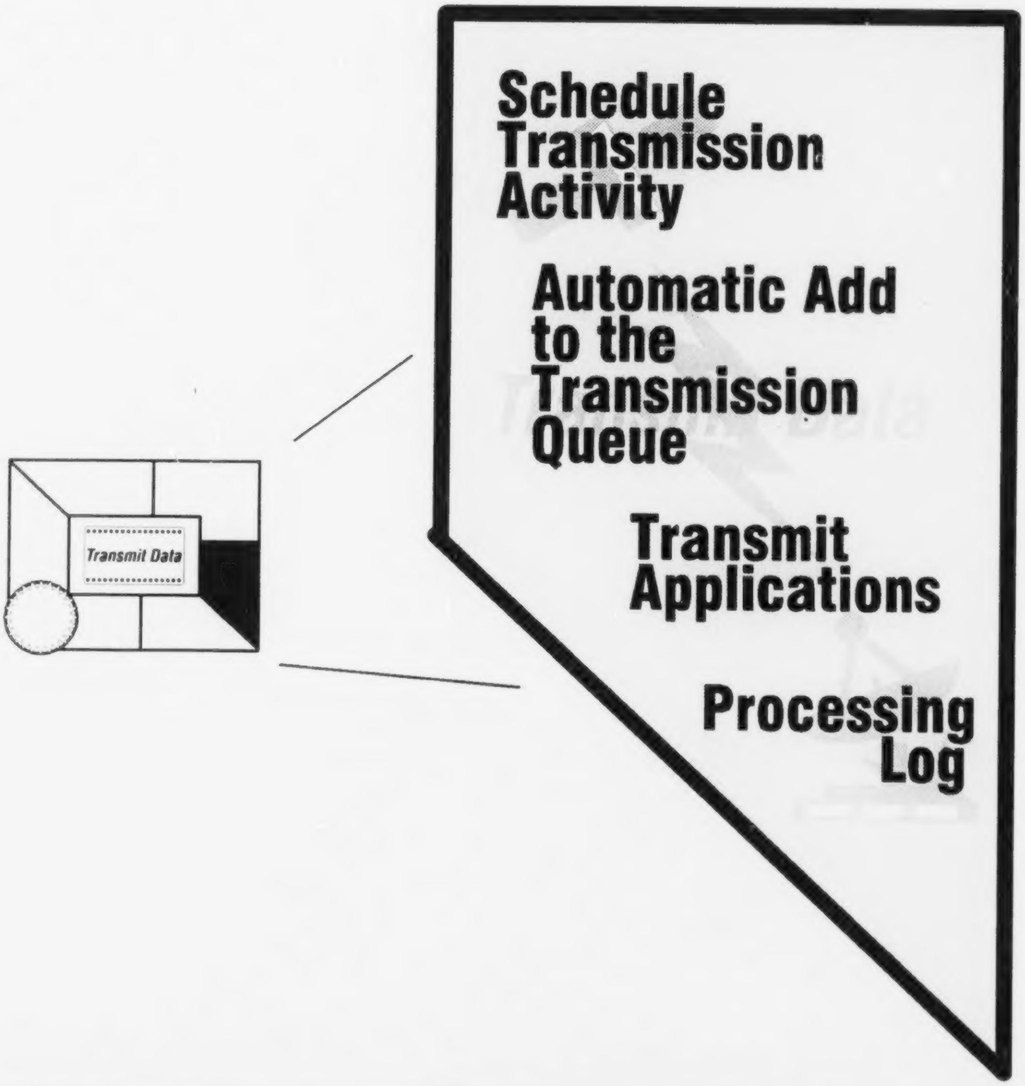
3. Do any of the records show an error code?

Lesson 3 – Transmit Data

Objectives

At the end of this lesson you should be able to:

1. Create a schedule of transmission activity.
2. Add an automatic record to the EDconn32 transmission queue.
3. Use the Transmit function to send and receive data.
4. Create a transmission processing log.


Transmit Data
Schedule Transmission Activity
Automatic Add to the Transmission Queue
Transmit Applications
Processing Log

Schedule of Transmission Activity

The most important component of the EDE process is the management of your data. You need to know where your data is stored, when you transmit a batch, and when you receive data from the processor. The first step to good data management is creating a processing schedule.

The following table provides an example of an application processing schedule. For each batch of data that you send to be processed, you will receive processed data back. For application processing, that may be an ISIR. The objective is to successfully track all records from entry through receipt and processing. Having a defined schedule assures that batches or records are not misplaced.

Application Processing

Monday	Tuesday	Wednesday	Thursday	Friday
Enter initial applications	Enter corrections	Enter Pell Payment data	Enter corrections	Enter initial applications
	Retrieve automatic ISIRs		Retrieve automatic ISIRs	
Retrieve processed Pell data	Retrieve processed correction ISIRs (from previous Thursday entry)	Retrieve processed application ISIRs (from previous Friday entry)	Retrieve processed application ISIRs (from Monday entry)	Retrieve processed correction ISIRs (from Tuesday entry)

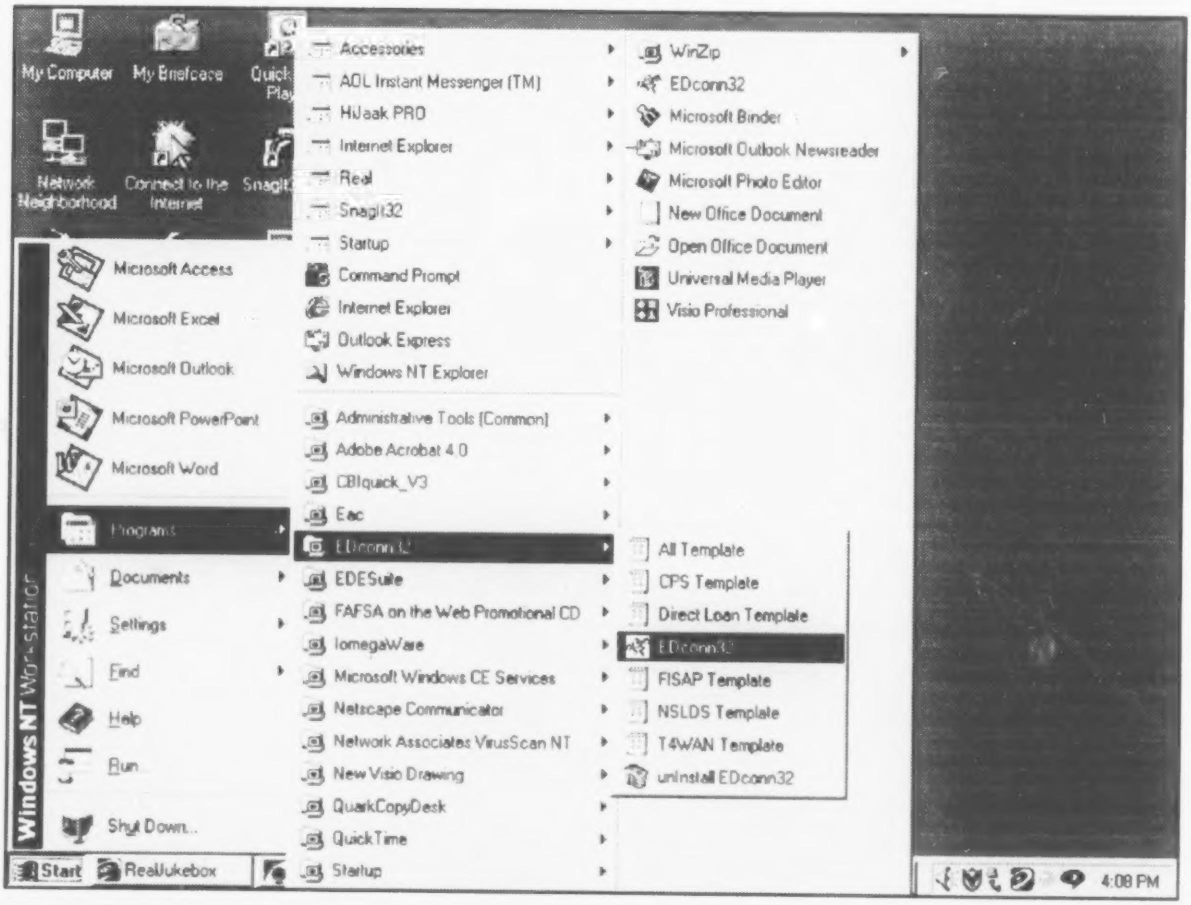
The timing of sending data is also important in planning your schedule. The processors retrieve different types of data from their network mailboxes at different times during the day.

EDconn32

*From the taskbar, click **Start/ Programs**. Then select EDconn32 program group and EDconn32.*

Open the Software

EDconn32 is the telecommunication software package that you use to send and receive data from the Student Aid Internet Gateway (SAIG).

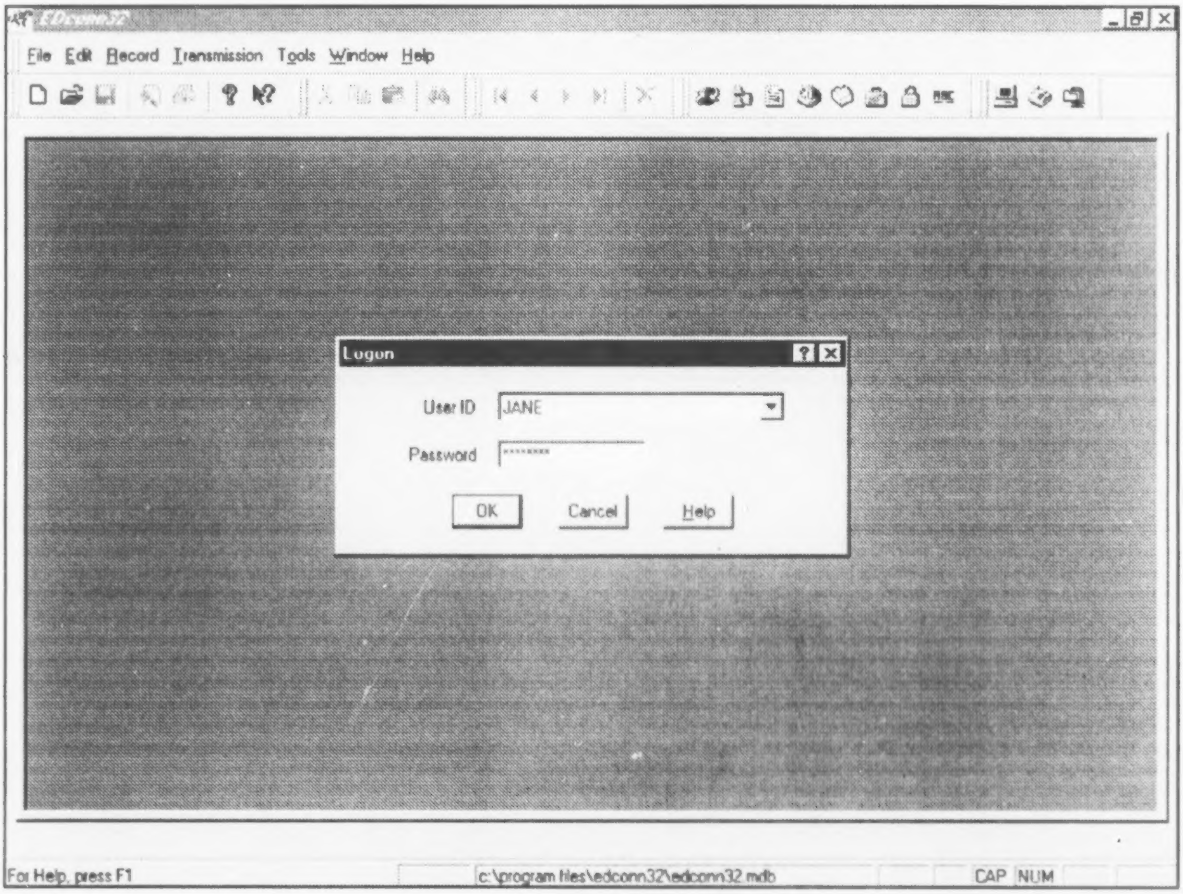

My Computer
My Briefcase
Quick Play
Network Neighborhood
Connect to the Internet
SnagIt
Accessories
AOL Instant Messenger (TM)
HiJaak PRO
Internet Explorer
Real
SnagIt32
Startup
Command Prompt
Internet Explorer
Outlook Express
Windows NT Explorer
Administrative Tools (Common)
Adobe Acrobat 4.0
CBIquick_V3
Eac
EDconn32
EDESuite
FAFSA on the Web Promotional CD
IomegaWare
Microsoft Windows CE Services
Netscape Communicator
Network Associates VirusScan NT
New Visio Drawing
QuarkCopyDesk
QuickTime
Startup
WinZip
EDconn32
Microsoft Binder
Microsoft Outlook Newsreader
Microsoft Photo Editor
New Office Document
Open Office Document
Universal Media Player
Visio Professional
All Template
CPS Template
Direct Loan Template
EDconn32
FISAP Template
NSLDS Template
T4WAN Template
uninstall EDconn32
Microsoft Access
Microsoft Excel
Microsoft Outlook
Microsoft PowerPoint
Microsoft Word
Programs
Documents
Settings
Find
Help
Run...
Shut Down...
Windows NT Workstation
Start
RealJukebox
4:08 PM

In this lesson we will only focus on specific functions of the software required to transmit and receive data. You need to be aware, however, that before you will be able to use EDconn32 at your school, you will first need to perform some setup functions such as establishing User IDs.

EDconn32 requires a User ID and password

The User ID in this example is Jane, and the password is JANE123 (all caps)

*Click **OK** to continue.*


EDconn32
File Edit Record Transmission Tools Window Help
Logon
OK
Cancel
Help
For Help, press F1
CAP NUM

User ID: JANE
Password: ********

c:\program files\edconn32\edconn32.mdb

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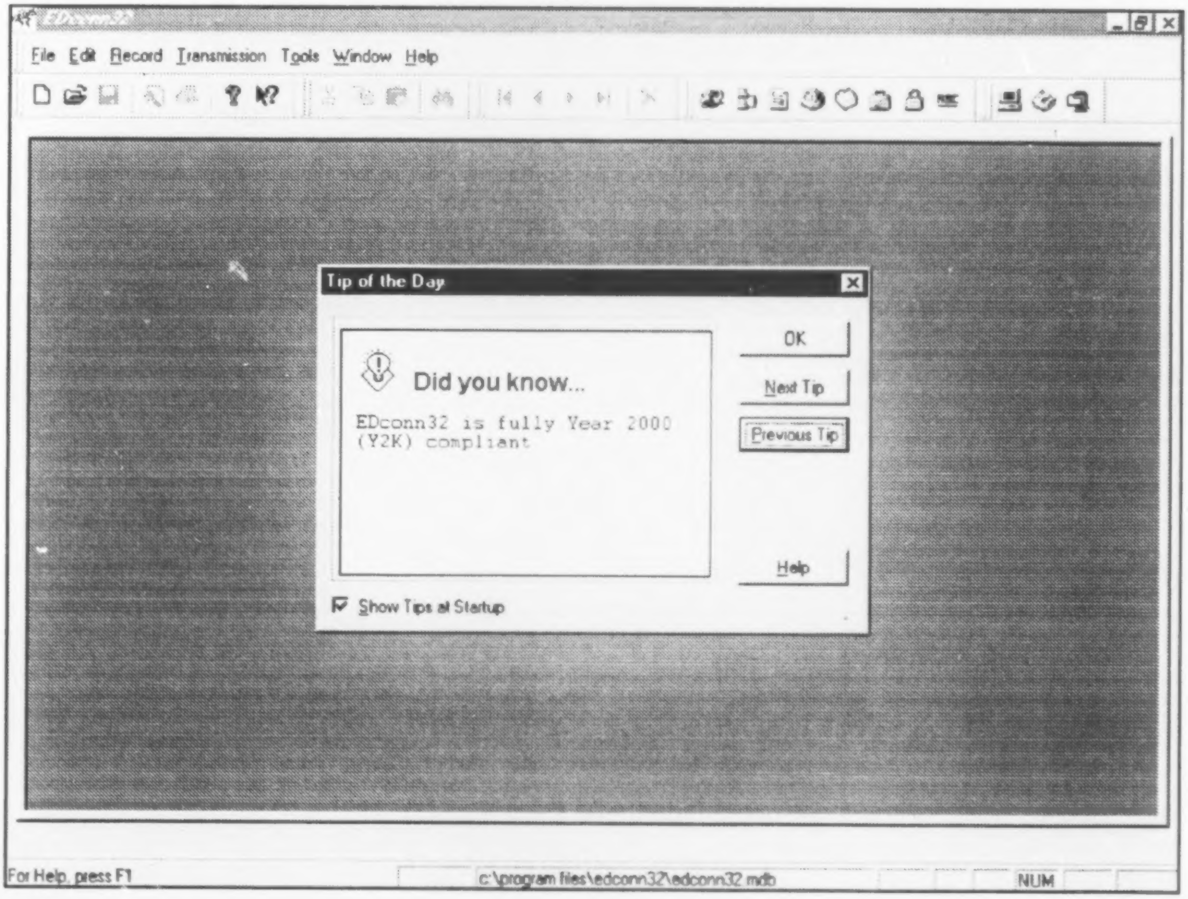
*Click **OK** to continue.*

Each time you open EDconn32 a tip of the day displays helpful hints for using the software.


EDconn32
File Edit Record Transmission Tools Window Help
Tip of the Day
OK
Next Tip
Previous Tip
Help
☑ Show Tips at Startup
For Help, press F1
NUM

Did you know...

EDconn32 is fully Year 2000 (Y2K) compliant

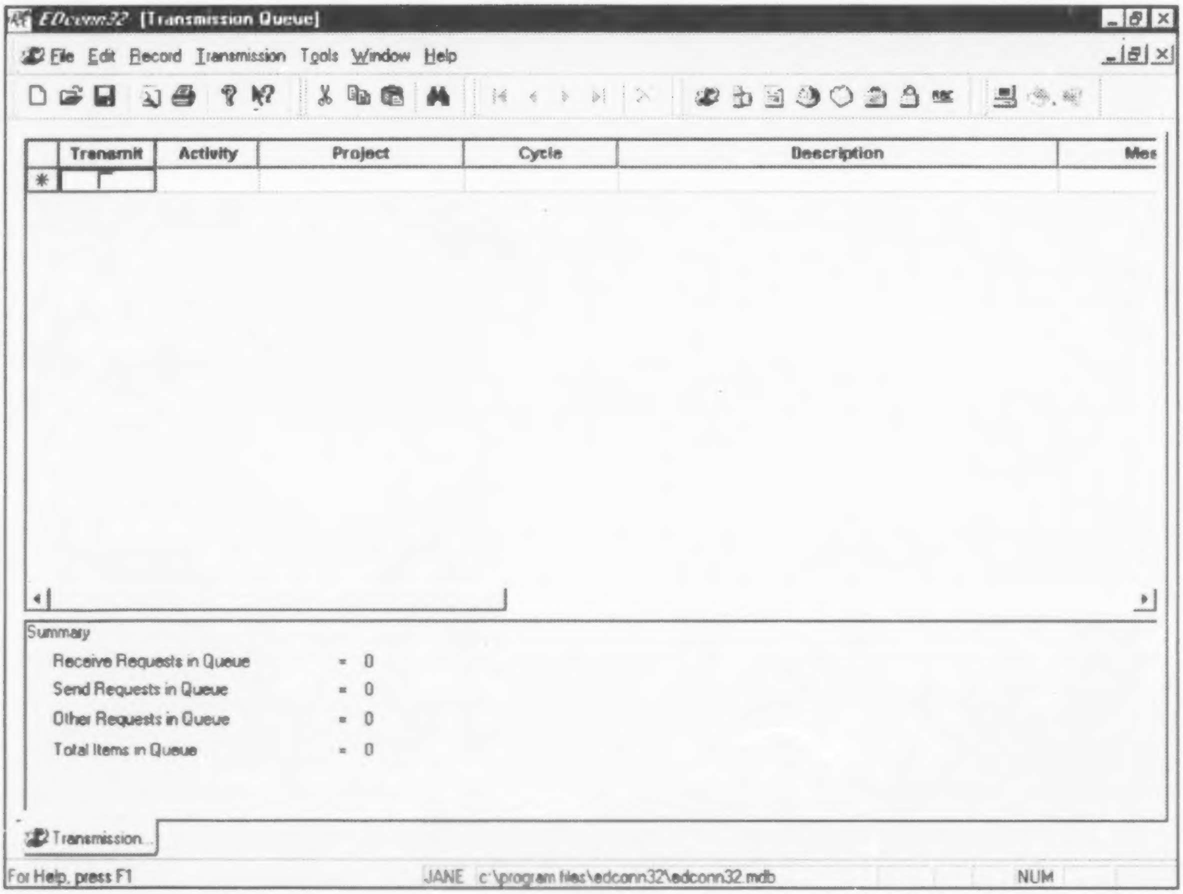
c:\program files\edconn32\edconn32.mdb

Transmission Queue View

In EDconn32, data is managed through the use of views. A view is simply a way of looking at the data you use. The primary view used is the Transmission Queue, which lists your pending requests to send data to and receive data from the network.

The icons on the toolbar allow you to select the view you want displayed. You may have several views open at one time. For the Transmission Queue, you will create a list of the types of data you wish to send/receive at the same time, such as applications or ISIRs.

*To create a New View for the Transmission Queue, you can click the **Transmission Queue** icon on the toolbar or select **File/New** from the menu*


EDconn32 [Transmission Queue]
File Edit Record Transmission Tools Window Help
Transmission...

	Transmit	Activity	Project	Cycle	Description	Mes
*						

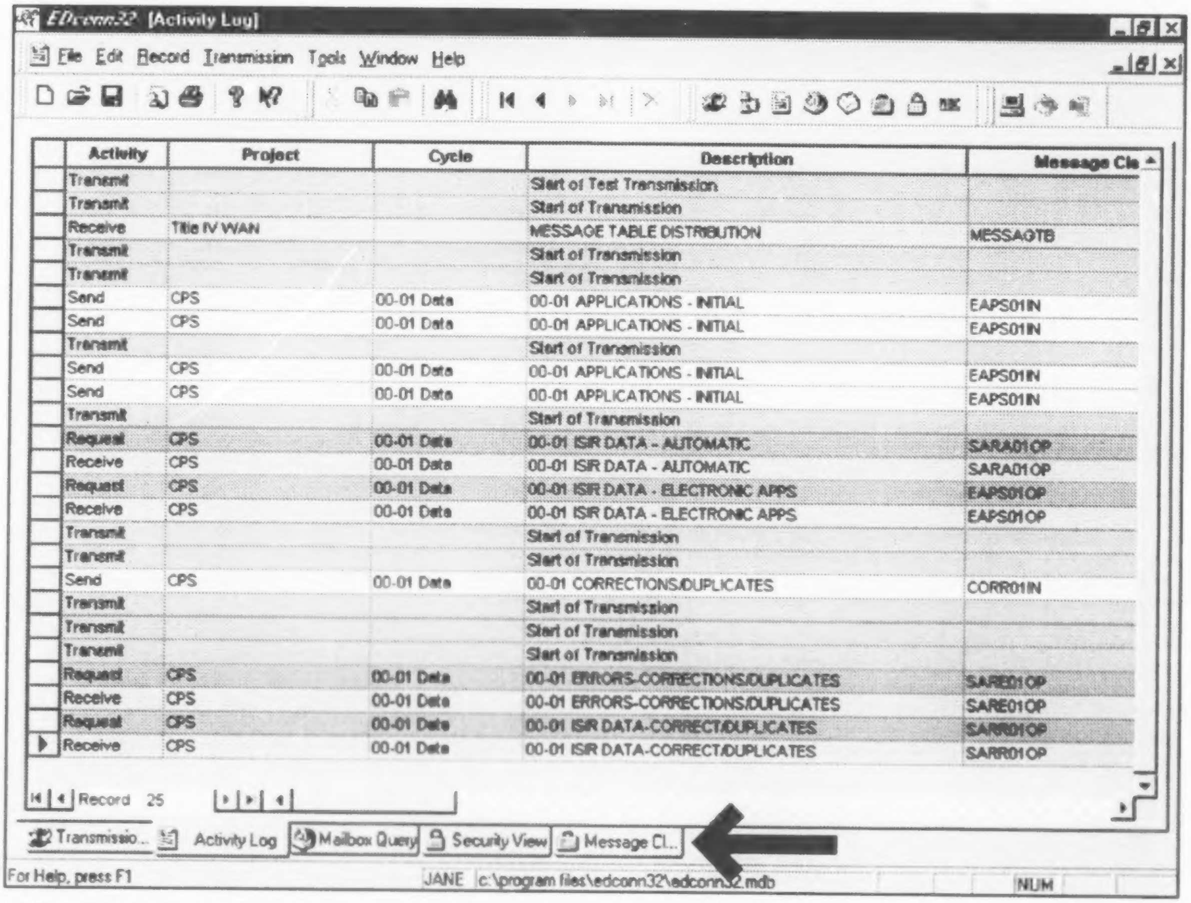
Summary

Receive Requests in Queue = 0
Send Requests in Queue = 0
Other Requests in Queue = 0
Total Items in Queue = 0

For Help, press F1 JANE c:\program files\edconn32\edconn32.mdb NUM

To open any view, click the appropriate icon on the toolbar or select ***File/New*** *from the menu.*

In addition to the Transmission Queue, there are several other views available: Activity Log, Archive View, Message Class Manager, Security View, and Text File View. We will be exploring the use of some of these views in later lessons. A tab is displayed for each open view. Tabs enable you to move easily between views.


EDconn32 [Activity Log]
File Edit Record Transmission Tools Window Help

Activity	Project	Cycle	Description	Message Cla
Transmit			Start of Test Transmission	
Transmit			Start of Transmission	
Receive	Title IV WAN		MESSAGE TABLE DISTRIBUTION	MESSAGTB
Transmit			Start of Transmission	
Transmit			Start of Transmission	
Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
Transmit			Start of Transmission	
Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
Transmit			Start of Transmission	
Request	CPS	00-01 Data	00-01 ISIR DATA - AUTOMATIC	SARA01OP
Receive	CPS	00-01 Data	00-01 ISIR DATA - AUTOMATIC	SARA01OP
Request	CPS	00-01 Data	00-01 ISIR DATA - ELECTRONIC APPS	EAPS01OP
Receive	CPS	00-01 Data	00-01 ISIR DATA - ELECTRONIC APPS	EAPS01OP
Transmit			Start of Transmission	
Transmit			Start of Transmission	
Send	CPS	00-01 Data	00-01 CORRECTIONS/DUPLICATES	CORR01IN
Transmit			Start of Transmission	
Transmit			Start of Transmission	
Transmit			Start of Transmission	
Request	CPS	00-01 Data	00-01 ERRORS-CORRECTIONS/DUPLICATES	SARE01OP
Receive	CPS	00-01 Data	00-01 ERRORS-CORRECTIONS/DUPLICATES	SARE01OP
Request	CPS	00-01 Data	00-01 ISIR DATA-CORRECT/DUPLICATES	SARR01OP
Receive	CPS	00-01 Data	00-01 ISIR DATA-CORRECT/DUPLICATES	SARR01OP

Record 25
Transmissio...
Activity Log
Mailbox Query
Security View
Message Cl...
For Help, press F1
JANE
c:\program files\edconn32\edconn32.mdb
NUM

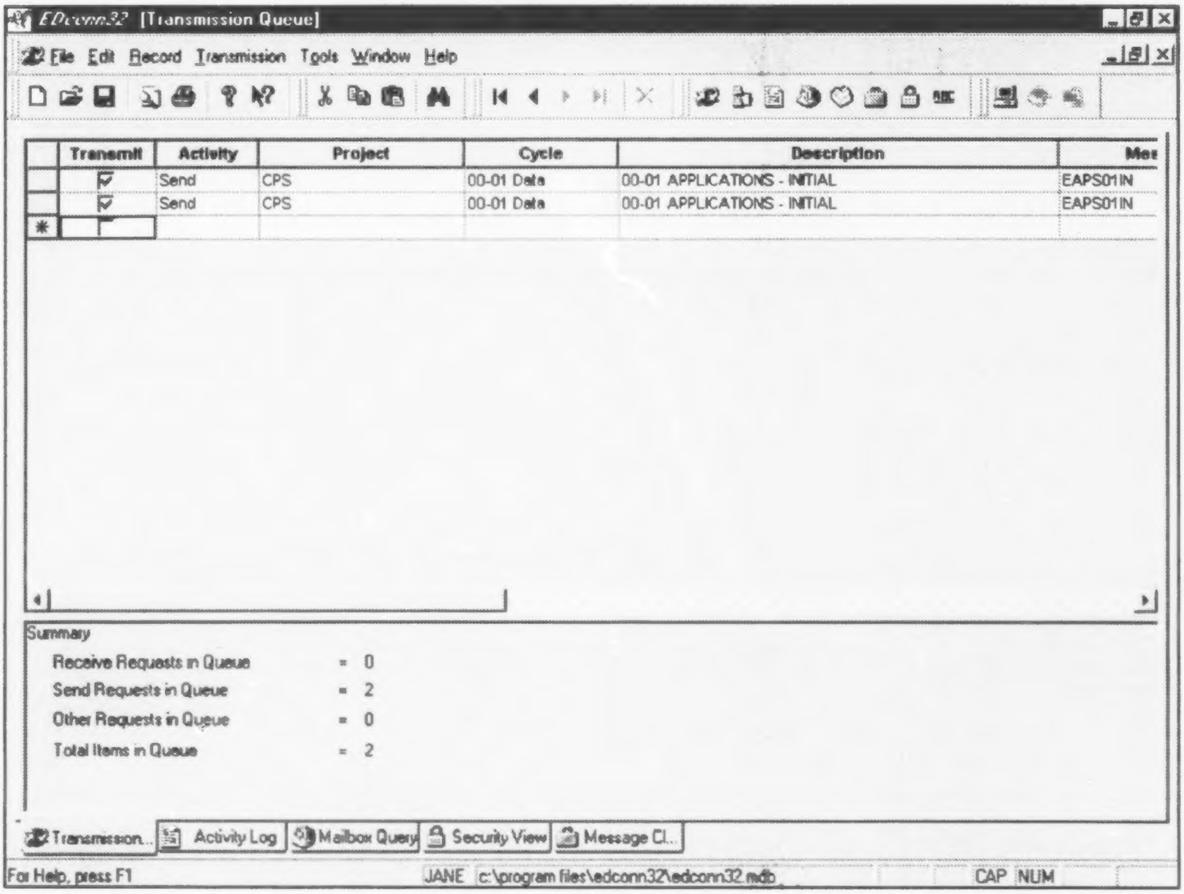
Adding a record to the Transmission Queue: Automatic

The Transmission Queue will display two types of records: Send and Request. You can add Send records in a variety of ways. The first method we will use is automatic. We will review other methods of adding rewards in later lessons. In order to use the automatic method you must perform two setup functions; one in EDExpress and one in EDconn32.

- In EDExpress, the Export to EDconn32 box must be selected in the Security User setup. (See "Getting Started", online training for setup information.)
- In EDconn32, you must set the file path for send and receive files.

Once each of these is established, each time you export a batch in EDExpress a send record will automatically appear when you open the Transmission Queue in EDconn32.

In this example, two application batches that were exported from EDExpress already appear in the Transmission Queue.


EDconn32 [Transmission Queue]
File Edit Record Transmission Tools Window Help
Transmission...
Activity Log
Mailbox Query
Security View
Message Cl...

	Transmit	Activity	Project	Cycle	Description	Mes
	☑	Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
	☑	Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
*	☐					

Summary

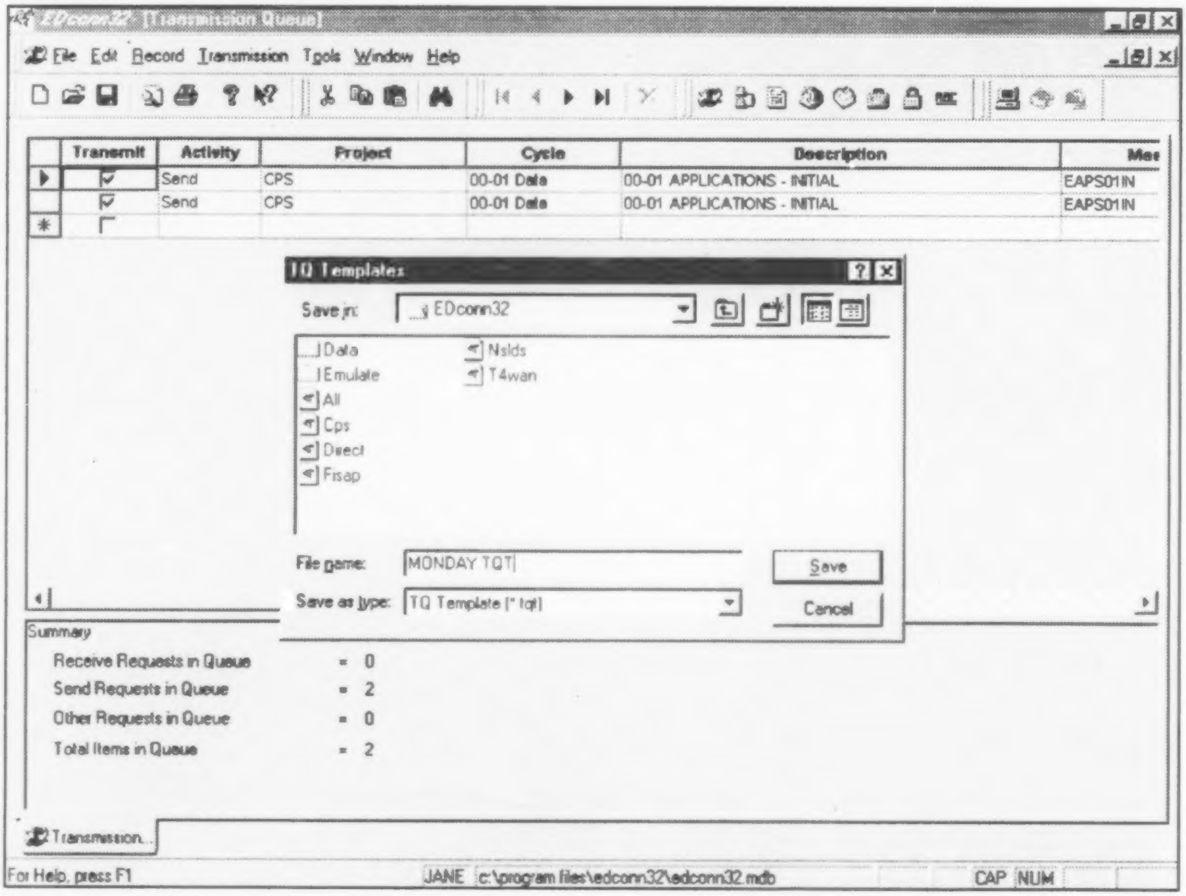
Receive Requests in Queue = 0
Send Requests in Queue = 2
Other Requests in Queue = 0
Total Items in Queue = 2

For Help, press F1 JANE c:\program files\edconn32\edconn32.mdb CAP NUM

Saving a Template

*Select **File/Save As** from the menu. The TQ Templates box displays the file location templates. If the location is satisfactory, click the **File Name** field and type the name of the template file. In this example the file is **MONDAY.TQT**. Click **Save** when finished.*

EDconn32 allows you to save all the records you have added to your queue in a template file, so you don't have to go through all the steps each time you send and receive data. If you perform the functions listed in this queue weekly, for example on Monday's, every Monday you simply retrieve this template and transmit or modify your records. Templates represent snapshots of a current view saved to a file.


EDconn32 - [Transmission Queue]
File Edit Record Transmission Tools Window Help
TQ Templates
Save in: EDconn32
Data
Emulate
All
Cps
Direct
Fisap
Nslds
T4wan
Save
Cancel
Transmission
For Help, press F1
CAP NUM

	Transmit	Activity	Project	Cycle	Description	Mes
▶	☑	Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
	☑	Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
*	☐					

File name: MONDAY TQT
Save as type: TQ Template (*.tqt)

Summary

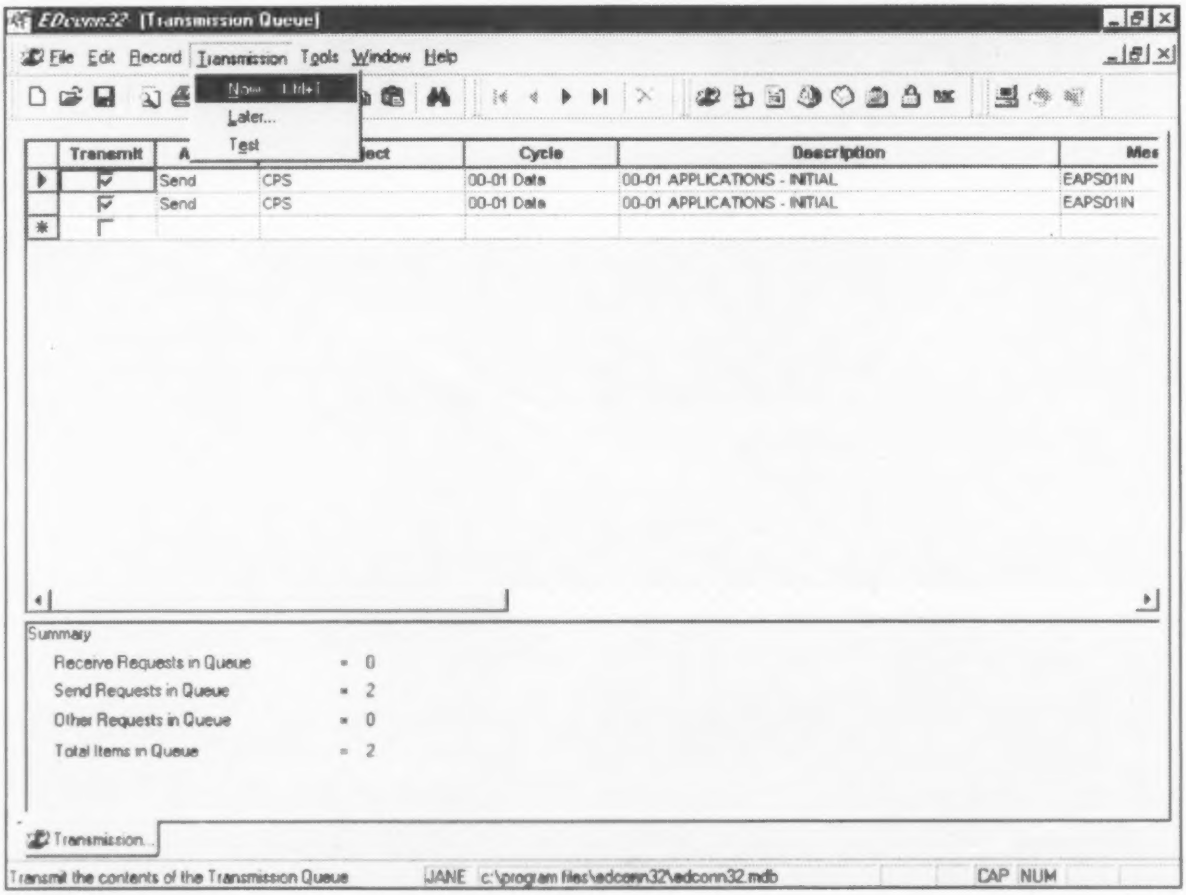
Receive Requests in Queue	= 0
Send Requests in Queue	= 2
Other Requests in Queue	= 0
Total Items in Queue	= 2

JANE c:\program files\edconn32\edconn32.mdb

Transmitting

Now that you have added Send records to the Transmission Queue, you are ready to connect to the network. You will use the Transmit Now function to send the data to the network.

*Click the **Transmit** icon on the toolbar or select **Transmission/Now** from the menu.*


EDconn32 [Transmission Queue]
File Edit Record Transmission Tools Window Help
Now Ctrl+T
Later...
Test
Transmission...

	Transmit	A	ject	Cycle	Description	Mes
▶	☑	Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
	☑	Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
*	☐					

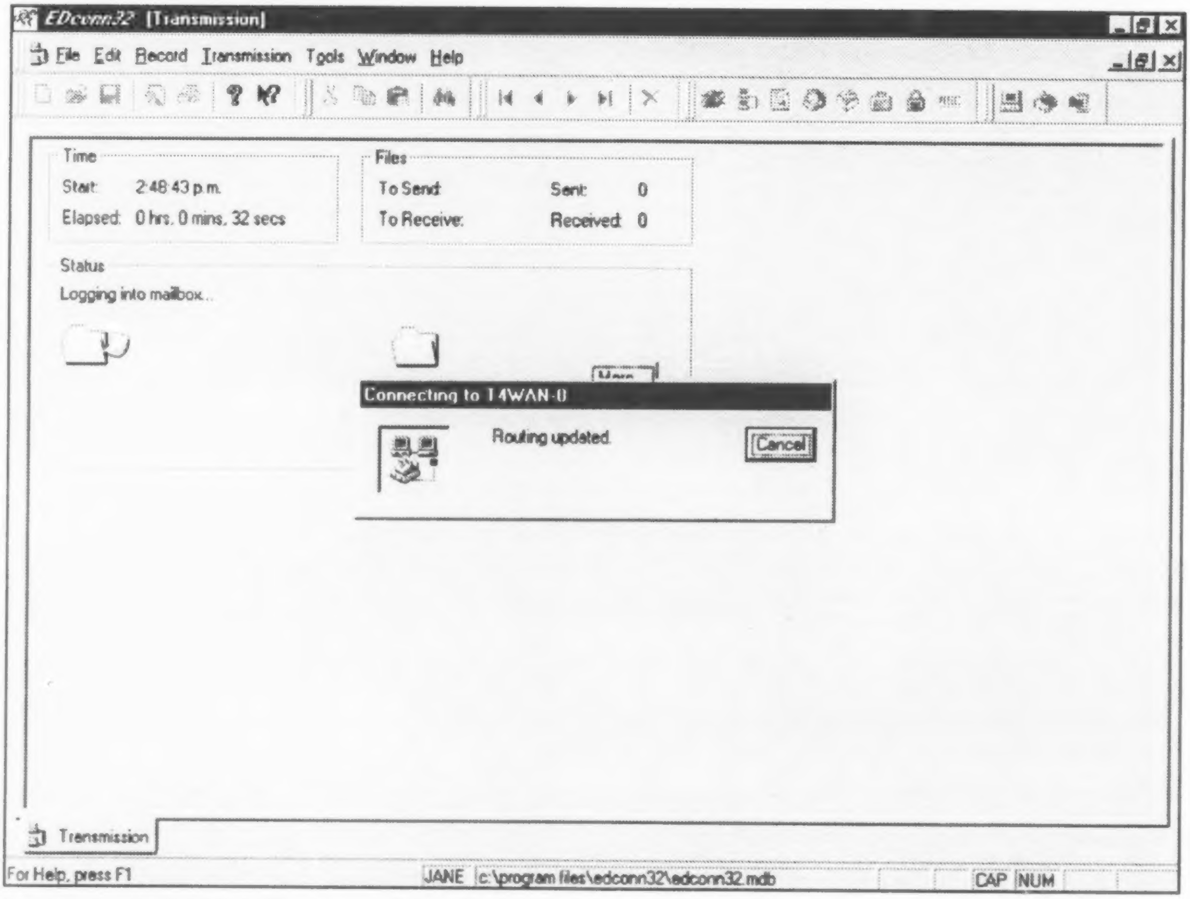
Summary

Receive Requests in Queue = 0
Send Requests in Queue = 2
Other Requests in Queue = 0
Total Items in Queue = 2

Transmit the contents of the Transmission Queue | JANE | c:\program files\edconn32\edconn32.mdb | CAP | NUM

In this example, the software is logging into the mailbox

Throughout the transmission information will be displayed in the Status area describing the action being peformed.


EDconn32 [Transmission]
File Edit Record Transmission Tools Window Help
Transmission
Cancel

Time
Start: 2:48:43 p.m.
Elapsed: 0 hrs, 0 mins, 32 secs

Files
To Send: Sent: 0
To Receive: Received: 0

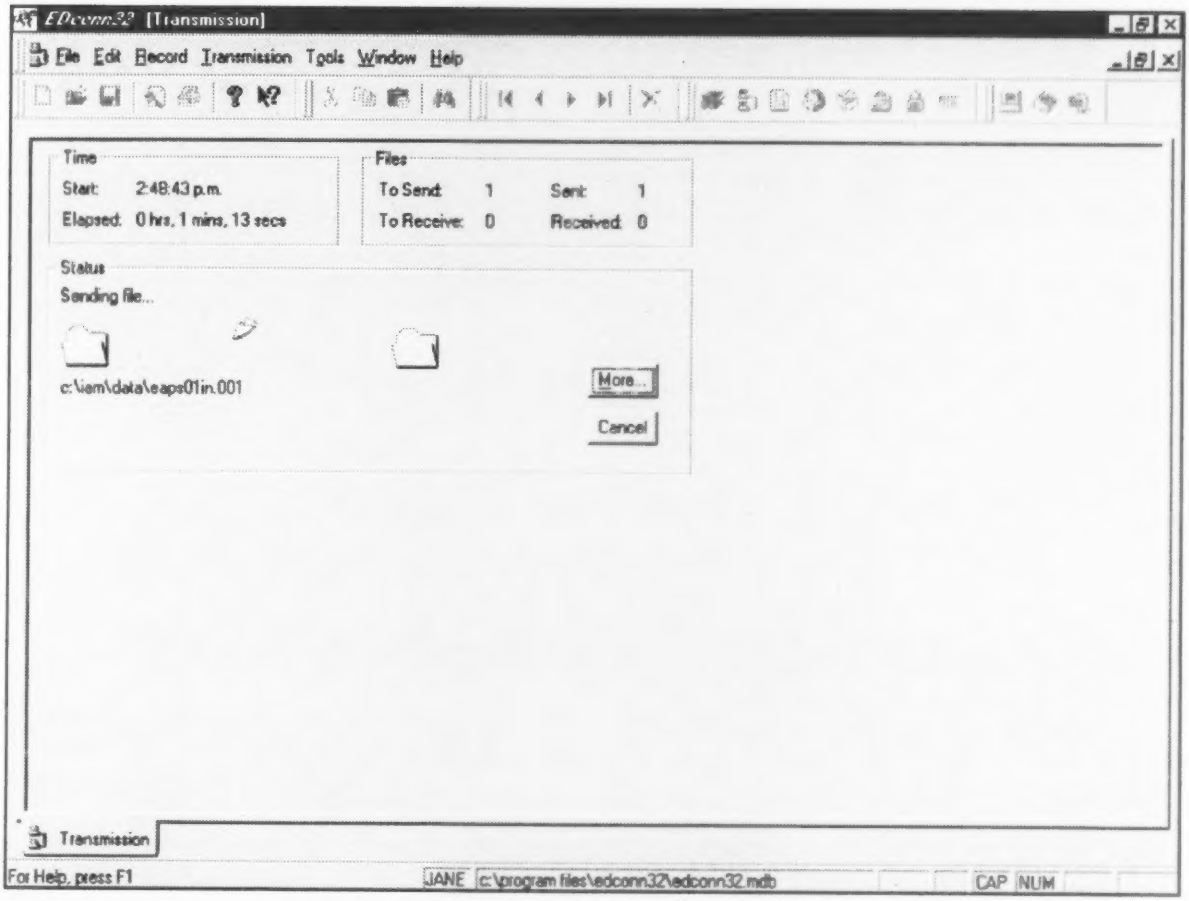
Status
Logging into mailbox...

Connecting to T4WAN-0
Routing updated.

For Help, press F1 | JANE | c:\program files\edconn32\edconn32.mdb | CAP | NUM

The first of the two EAPS files has been sent. The second file is in progress.

*Click the **More** button to view information about the transmission*


EDconn32 [Transmission]
File Edit Record Transmission Tools Window Help
Transmission
More...
Cancel

Time
Start: 2:48:43 p.m.
Elapsed: 0 hrs, 1 mins, 13 secs

Files
To Send: 1 Sent: 1
To Receive: 0 Received: 0

Status
Sending file...

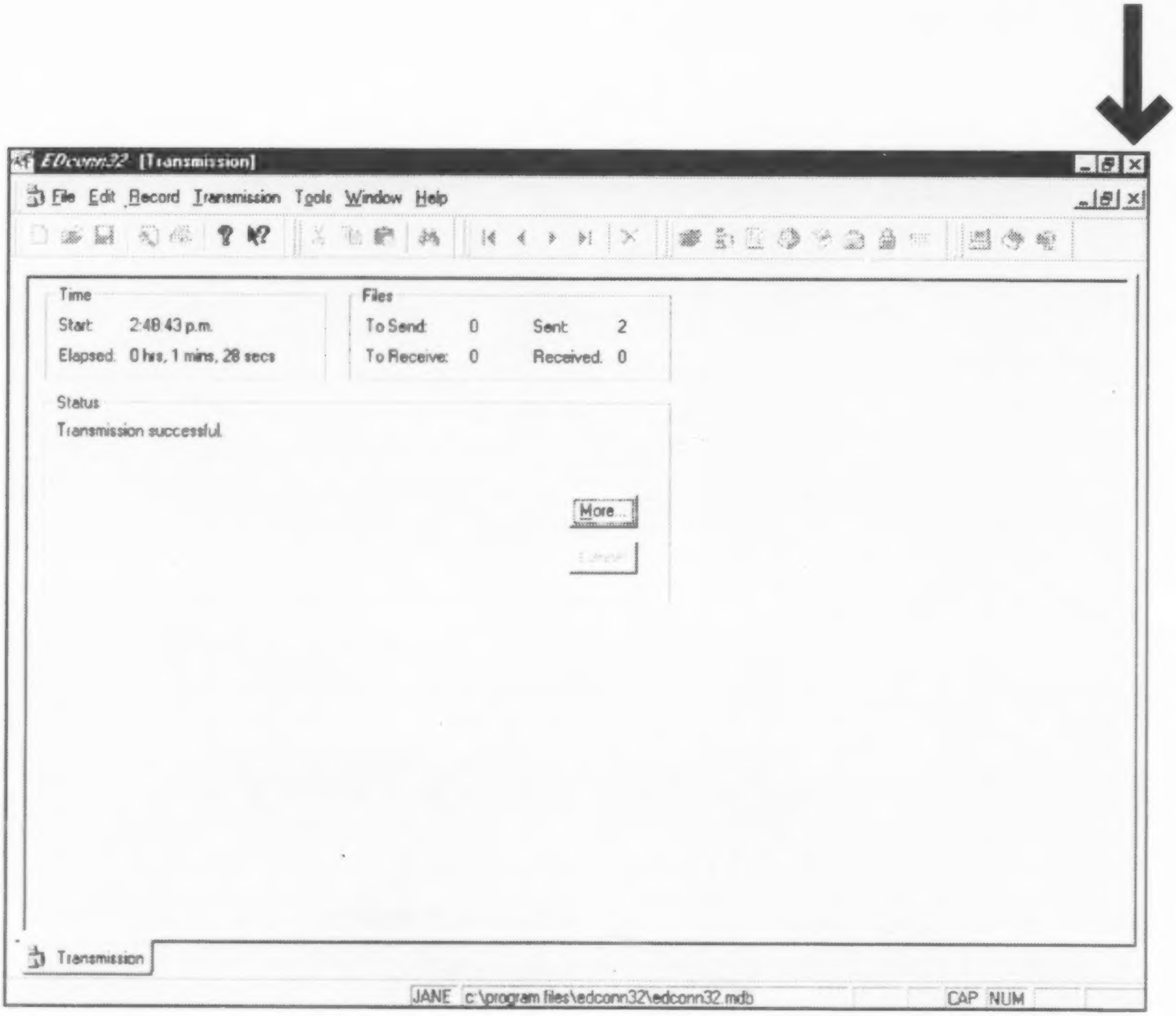
c:\iem\data\eaps01in.001

For Help, press F1 JANE c:\program files\edconn32\edconn32.mdb CAP NUM

*Click the Close (**X**) button to close the Transmition Queue*

Once the transmission is complete, a status of Transmission Successful will be displayed. The Files area displays the number of files successfully sent and received.

This box provides information about the transmission activities. If your transmission is not successful, you can look here to find out why.


EDconn32 - [Transmission]
File Edit Record Transmission Tools Window Help
More...
Cancel
Transmission
JANE
CAP NUM

Time
Start: 2:48:43 p.m.
Elapsed: 0 hrs, 1 mins, 28 secs

Files
To Send: 0 Sent: 2
To Receive: 0 Received: 0

Status
Transmission successful.

c:\program files\edconn32\edconn32.mdb

Transmission Processing Log

You know that the transmission was successful, but what if the batch was rejected by the processor? How can you keep track of all of the batches you transmit to the network? Creating a transmission processing log will help you track records through the process. The log will clearly show where records are in the process and where they will go next.

EDExpress		**EDconnect**				**EDExpress**	
Batch ID#	Export File Name [Message Class] (Date)	File Transmitted (Initials) ✓	Date Sent	Received File Name [Message Class] (Date)	Date Rec'd.	File Imported (Initials) ✓	Date Imported

This example includes recording activities from both EDExpress and EDconn32. In Lesson 5 of this unit we will show how the Activity Log in EDconn32 can assist you in this activity.

Lesson 3 Exercise

Scenario:

In your schedule of weekly activities, today is Monday, the day to transmit initial electronic application batches. You will be using a simulation of EDconn32 to complete this task.

Exercise Instructions:

The tasks for this exercise are outlined below. You will complete the tasks and answer questions that pertain to those tasks. **Read the tasks AND the questions before you begin the exercise! Answers to some of the questions may be a part of the task or involve a computer response.**

1. Open and log in to EDconn32.

Step	Action
1	From the taskbar, click **Start/Programs**. Then select the **EDconn32** program group and **Edconn32 (Unit 2, Lesson 3)**.
2	Type the User ID: **Jane**.
3	Type the Password: **Jane123**.
4	Click **OK**.
5	Click **OK** to close the Tip of the Day.

2. Record your activity in the Transmission Processing Log.

3. Transmit electronic application batches.

Step	Action
1	Select **Transmission/Now** from the menu or click the transmission button on the toolbar.
2	When the transmission is complete, click the close box in the top right corner to close the application.

Lesson 3 Exercise, continued

1. How many batches were transmitted?

2. What were the message class filenames?

3. How did the files get in the transmission queue?

4. How long did the transmission take to complete?

5. What important task should you always complete when you transmit data?

More Thinking

Is there another way to start the transmission other than using the main menu functions?

Lesson 4 – Process Data

Objectives

At the end of this lesson you should be able to:

1. Understand where data goes and how it is processed.

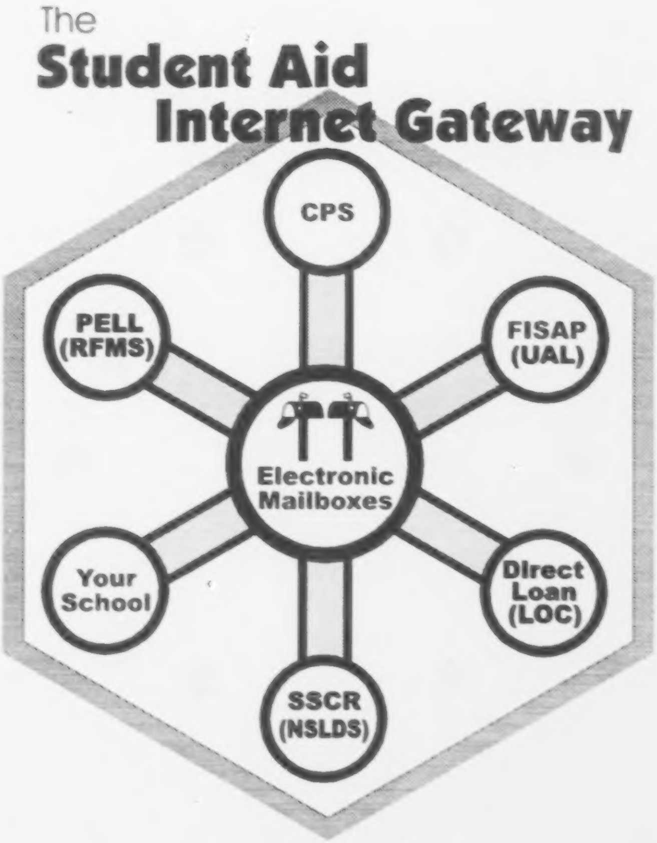
Process Data

Where Data Goes

Functions of CPS

Who Receives and Processes the Data?

AS an EDE participant, you will be able to exchange data with many Student Aid Internet Gateway (SAIG) systems, such as the Central Processing System (CPS), the Recipient Financial Management System (RFMS), the Loan Origination Center (LOC), campus-based Title IV programs for FISAP, and the National Student Loan Data System (NSLDS).


The
Student Aid
Internet Gateway
CPS
PELL (RFMS)
FISAP (UAL)
Electronic Mailboxes
Your School
Direct Loan (LOC)
SSCR (NSLDS)

These are some of the major databases that participate in the Student Aid Internet Gateway.

The Central Processing System

The Central Processing System processes both paper and electronic student applications. CPS calculates a student's expected family contribution (EFC) and sends a processed Institutional Student Information Record (ISIR) to the school. Using EDE with the SAIG enables institutions to:

- Submit initial federal student application data electronically and receive results electronically in the form of an ISIR.
- Submit renewal application data electronically and receive results as ISIRs.
- Receive ISIRs for students who submitted a Free Application for Federal Student Aid (FAFSA) using FAFSA Express, FAFSA on the Web, or a paper FAFSA and indicated the institution as one of their six choices.
- Submit corrections to federal application data electronically and receive results as ISIRs.

What does CPS do with the electronic application?

- The batches of application records are first run through data entry edits to ensure that the records and type of data submitted are valid. If the data fails this edit, an error file is sent back to you.
- Once the data passes the initial edits, the records are sent to all of the external match agencies, including:

  - Social Security Administration
  - National Student Loan Data System
  - Selective Service
  - Immigration and Naturalization Service

  This process normally takes 24 hours.
- After all match data is returned, the records are included in the daily compute process. During this compute, the application is checked using several editing criteria designed to detect possible inconsistencies and mistakes. If all of the edits are passed, an EFC is calculated for the student.
- After all processing is complete, the CPS produces the electronic Institutional Student Information Record (ISIR) and transmits the records to your network mailbox.

How long does it take?

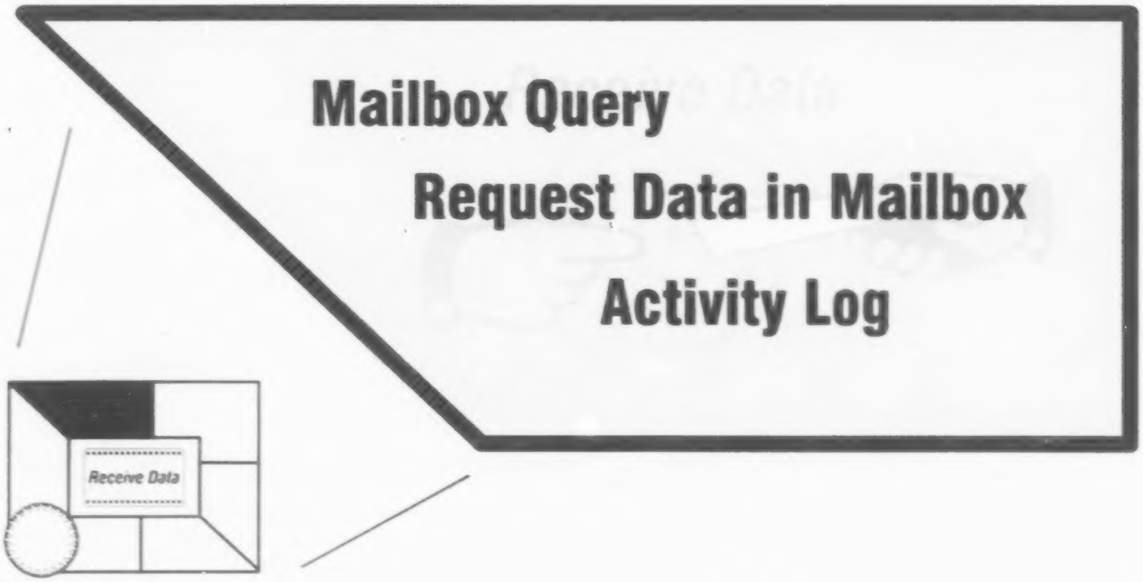
The CPS retrieves all records on the network by 9 a.m. each workday and returns them to the network as processed ISIRs within 72 business hours. Submit a request for duplicate ISIRs

Lesson 5 – Receive Data

Objectives

At the end of this lesson you should be able to:

1. Use the Mailbox Query to view any remaining data on the network.
2. Add a Request to receive data to the Transmission Queue from Mailbox Query.
3. Use the Activity Log to review and confirm what happened during the transmission.


Mailbox Query
Request Data in Mailbox
Activity Log
Receive Data

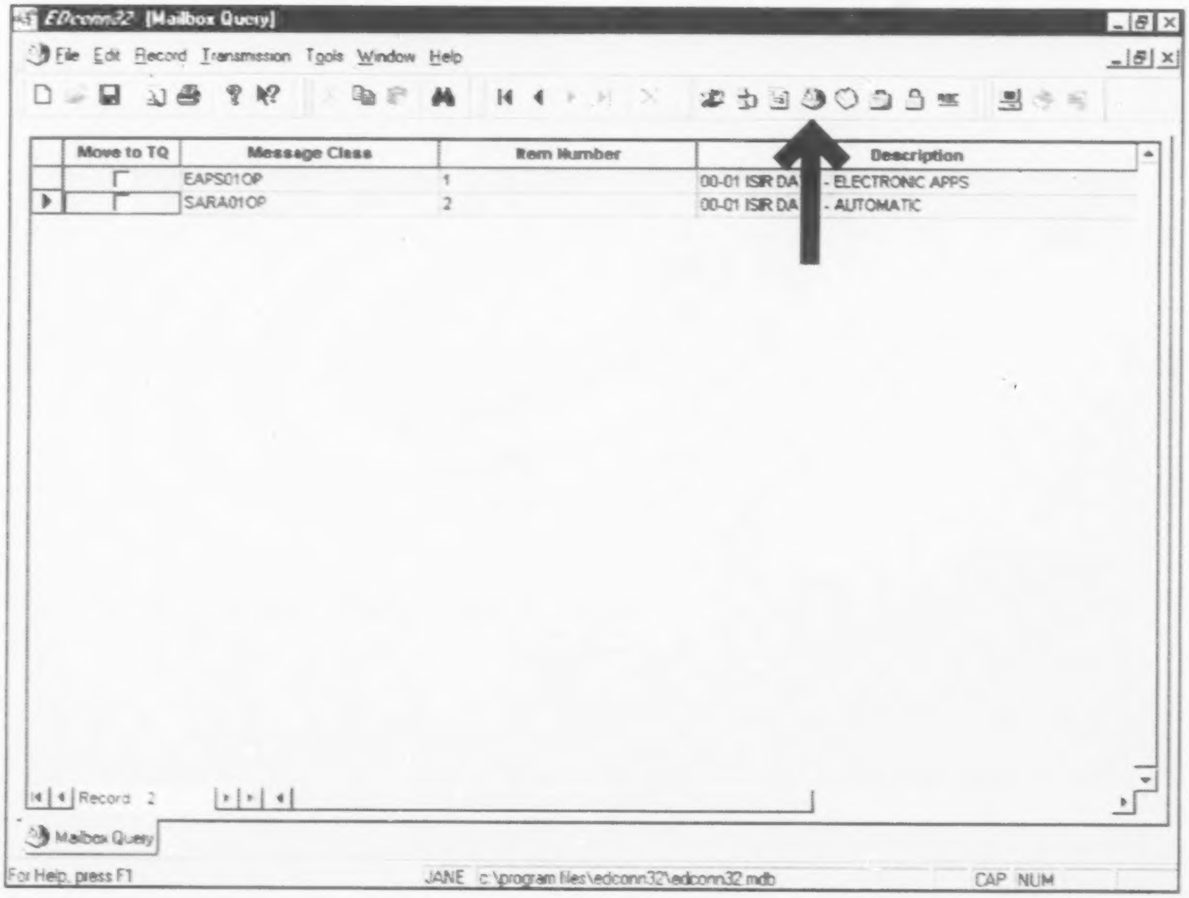
Mailbox Query

*Click the **Mailbox Query** icon on the toolbar or select **File/New/Mailbox Query** from the menu*

In this example, there were two batches of ISIRs in the mailbox waiting to be retrieved

In Lesson 3, you learned how to send data to the network. The next step in the transmission process is to receive data from the network. One way of doing this is to submit a request for all types of data that are in your network mailbox. If you have different schedules and staff managing different types of data at different times of the week, you may not want to just dump the entire contents of your mailbox at once without knowing what is out there.

One tool provided to assist you in identifying data in your mailbox is Mailbox Query. During each transmission EDconn32 polls your network mailbox to see if there are any batches of data that you have not yet retrieved. You can then use the Mailbox Query view to display information about those batches. Not only can you view the batches in your mailbox, you can also easily add these records to the Transmission Queue.


EDconn32 [Mailbox Query]
File Edit Record Transmission Tools Window Help
Record 2
Mailbox Query
For Help, press F1
JANE c:\program files\edconn32\edconn32.mdb
CAP NUM

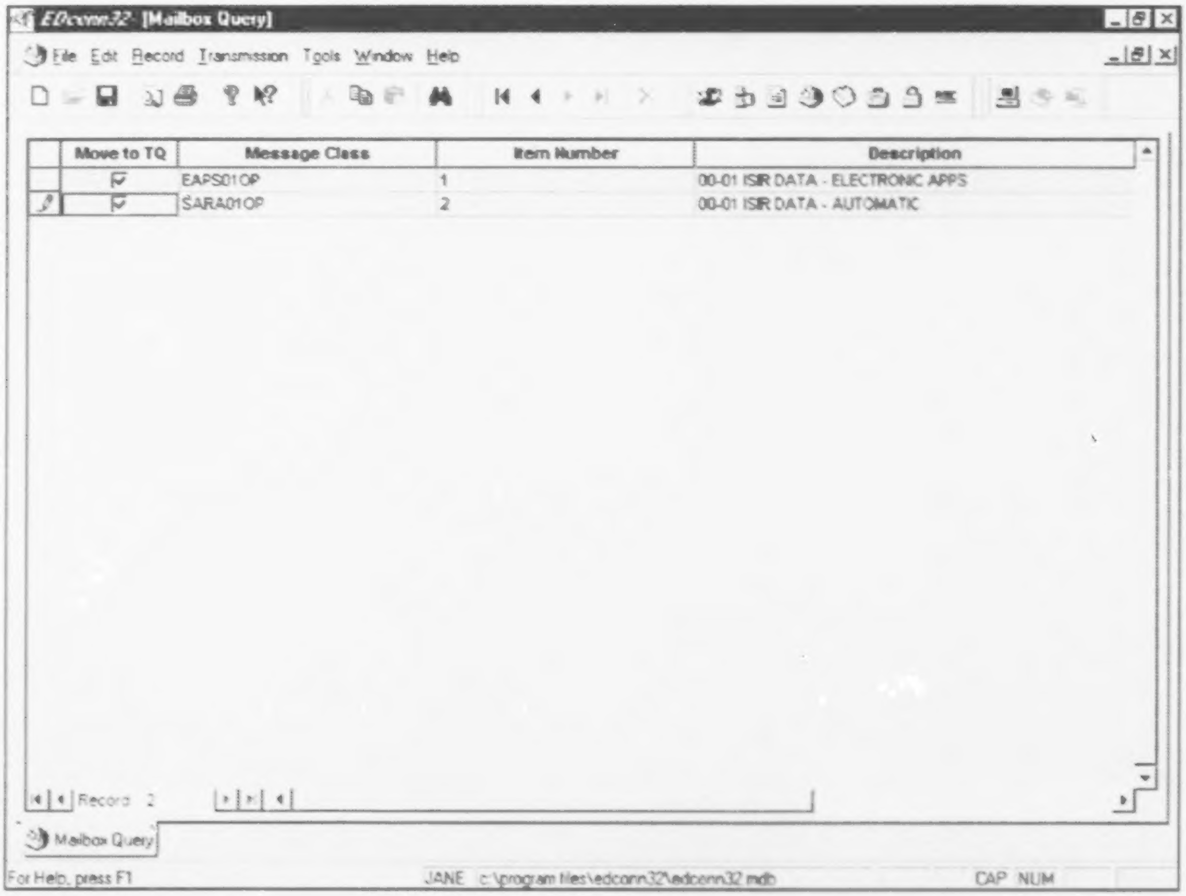
Move to TQ	Message Class	Item Number	Description
☐	EAPS01OP	1	00-01 ISIR DA - ELECTRONIC APPS
☐	SARA01OP	2	00-01 ISIR DA - AUTOMATIC

The message class, item number and description identify each record in the Mailbox Query. To create a Request for the records in your mailbox, click the box for each record in the Move to TQ column, beginning with the first line.

Note: Refer to page 2-37 for message class information.

Click the checkboxes in the ***Move to TQ*** *column.*

Click the ***Save*** *icon on the toolbar to add these records to the Transmission Queue.*


EDconn32 - [Mailbox Query]
File Edit Record Transmission Tools Window Help
Record: 2
Mailbox Query
For Help, press F1
JANE c:\program files\edconn32\edconn32.mdb
CAP NUM

	Move to TQ	Message Class	Item Number	Description
	☑	EAPS01OP	1	00-01 ISIR DATA - ELECTRONIC APPS
✎	☑	SARA01OP	2	00-01 ISIR DATA - AUTOMATIC

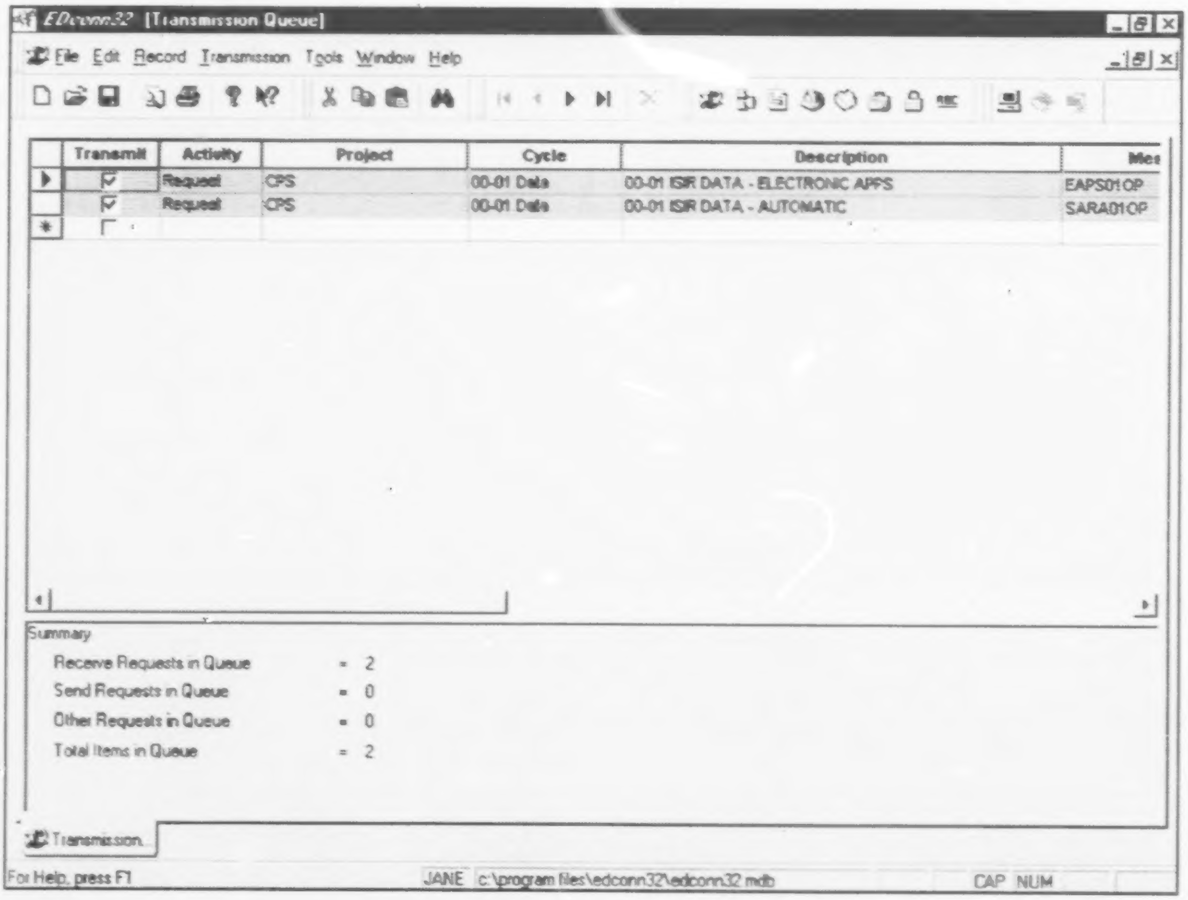
Open the ***Transmission Queue****.*

Select ***Transmission/ Now*** *from the menu or click the* ***Transmission*** *button.*

When the transmission is complete, click the ***Close*** *button to close the Transmission view.*

Now the records you selected have been added to the Transmission Queue. You are ready to transmit your request to the network.

Tip: Do a Transmission with a blank TQ just to see what is in your mailbox.


EDconn32 [Transmission Queue]
File Edit Record Transmission Tools Window Help
Transmission
For Help, press F1
JANE
CAP NUM

	Transmit	Activity	Project	Cycle	Description	Mes
▶	☑	Request	CPS	00-01 Data	00-01 ISIR DATA - ELECTRONIC APPS	EAPS01OP
	☑	Request	CPS	00-01 Data	00-01 ISIR DATA - AUTOMATIC	SARA01OP
*	☐					

Summary

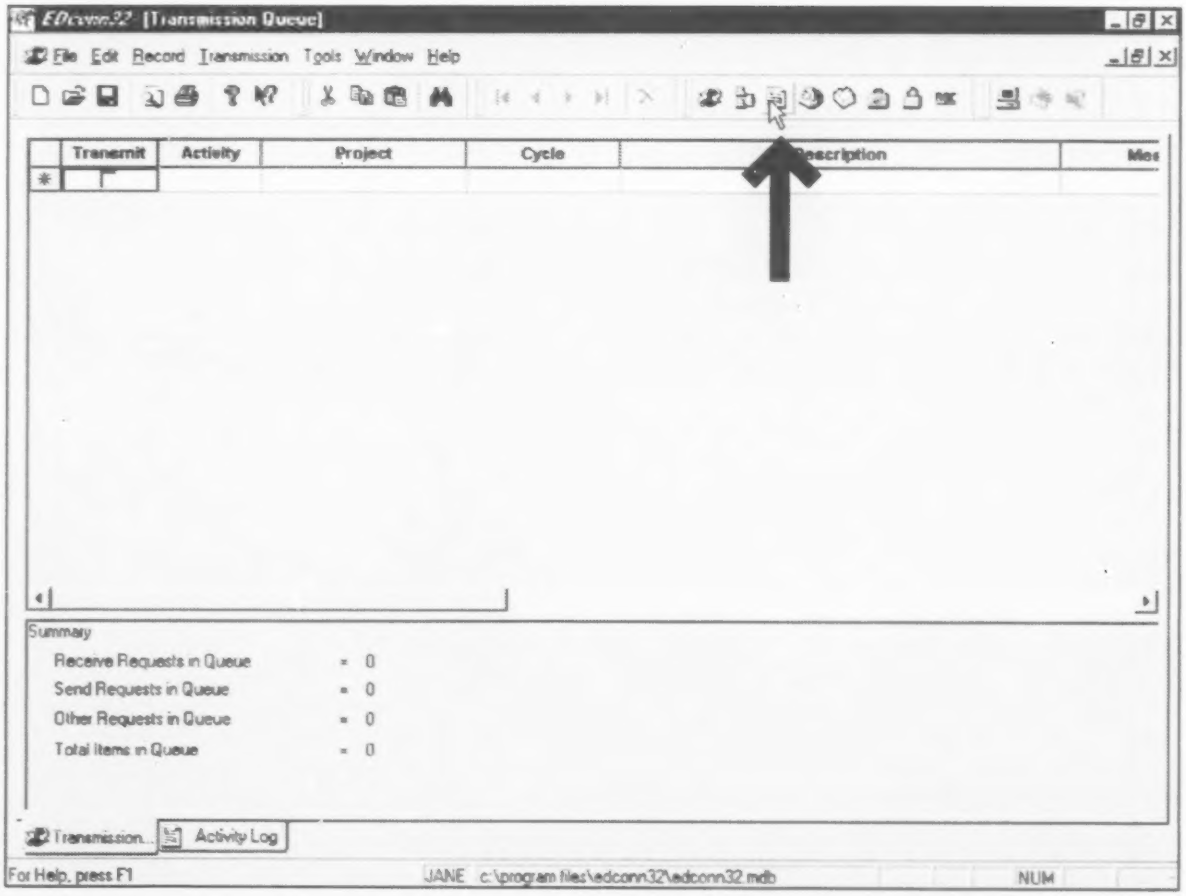
Receive Requests in Queue = 2
Send Requests in Queue = 0
Other Requests in Queue = 0
Total Items in Queue = 2

c:\program files\edconn32\edconn32.mdb

Activity Log

At the conclusion of each transmission, the results of what happened during the transmission are stored in the Activity Log.

*To view the Activity Log, click the **Activity Log** icon on the toolbar.*

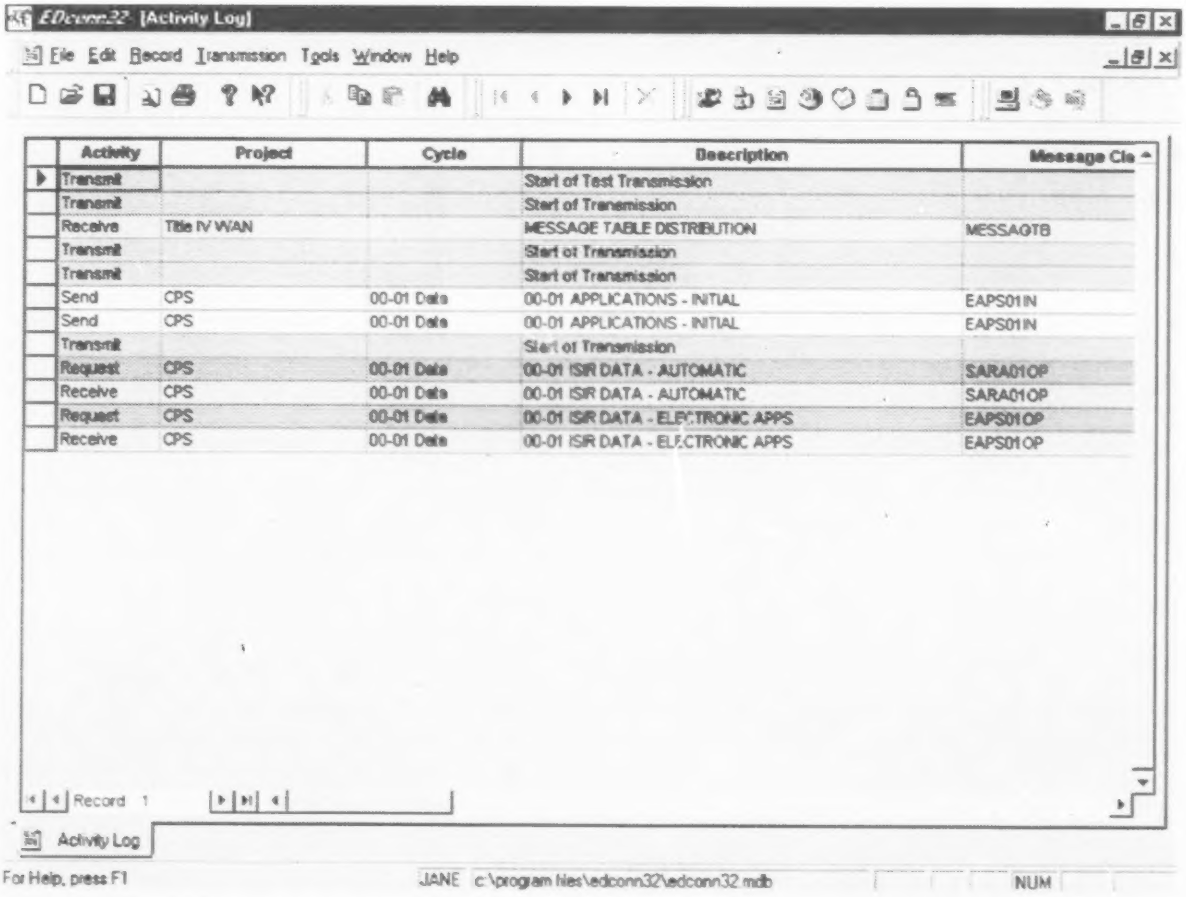

EDconn32 - [Transmission Queue]
File Edit Record Transmission Tools Window Help
Transmit
Activity
Project
Cycle
Description
Mes
Transmission...
Activity Log

Summary
Receive Requests in Queue = 0
Send Requests in Queue = 0
Other Requests in Queue = 0
Total Items in Queue = 0

For Help, press F1 JANE c:\program files\edconn32\edconn32.mdb NUM

Click the horizontal scroll bar to view more information.

Now compare the information stored here with the information you recorded in your Processing Log in Lesson 3. Another way to keep a Processing Log of transmission activity is to print the Activity Log to paper or electronic file. All of the information you need, including the user that performed the transmission, is included in the log. Each row represents a different transmission activity.


EDconn32 - [Activity Log]
File Edit Record Transmission Tools Window Help
Record 1
Activity Log

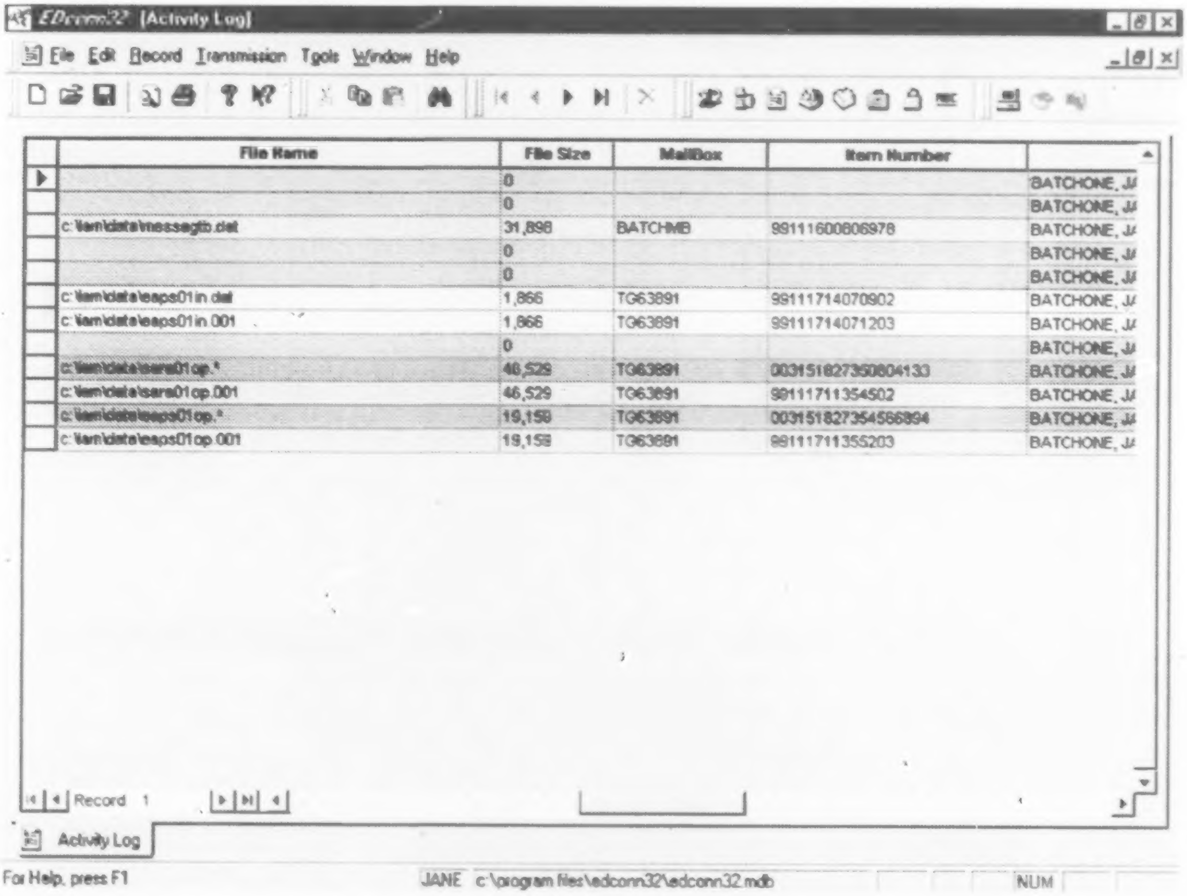
Activity	Project	Cycle	Description	Message Cla
Transmit			Start of Test Transmission	
Transmit			Start of Transmission	
Receive	Title IV WAN		MESSAGE TABLE DISTRIBUTION	MESSAGTB
Transmit			Start of Transmission	
Transmit			Start of Transmission	
Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
Transmit			Start of Transmission	
Request	CPS	00-01 Data	00-01 ISIR DATA - AUTOMATIC	SARA01OP
Receive	CPS	00-01 Data	00-01 ISIR DATA - AUTOMATIC	SARA01OP
Request	CPS	00-01 Data	00-01 ISIR DATA - ELECTRONIC APPS	EAPS01OP
Receive	CPS	00-01 Data	00-01 ISIR DATA - ELECTRONIC APPS	EAPS01OP

For Help, press F1 JANE c:\program files\edconn32\edconn32.mdb NUM

Just as in the Transmission Queue, information is provided about the kind of data contained in each record.

Tip: The type of activity in each record can be easily identified by the color of the row.

Click the horizontal and vertical scroll bars to view more information.


EDconn32 - [Activity Log]
File Edit Record Transmission Tools Window Help
Record 1
Activity Log
For Help, press F1
JANE
NUM

c:\program files\edconn32\edconn32.mdb

File Name	File Size	MailBox	Item Number	
	0			BATCHONE, J
	0			BATCHONE, J
c:\em\data\messagtb.dat	31,898	BATCHMB	99111600806978	BATCHONE, J
	0			BATCHONE, J
	0			BATCHONE, J
c:\em\data\eaps01in.dat	1,866	TG63891	99111714070902	BATCHONE, J
c:\em\data\eaps01in.001	1,866	TG63891	99111714071203	BATCHONE, J
	0			BATCHONE, J
c:\em\data\sara01op.*	46,529	TG63891	003151827350604133	BATCHONE, J
c:\em\data\sara01op.001	46,529	TG63891	99111711354502	BATCHONE, J
c:\em\data\eaps01op.*	19,159	TG63891	003151827354566894	BATCHONE, J
c:\em\data\eaps01op.001	19,159	TG63891	99111711355203	BATCHONE, J

BEST COPY AVAILABLE

Lesson 5 Exercise

Scenario:

During your last transmission, you only sent files to the network. You did not check to see if there were any processed batches to retrieve from your mailbox. Now, you need to determine if there are any files to be retrieved. If there are, you need to create a request to retrieve them. You will be using a simulation of EDconn32 to complete this task.

Exercise Instructions:

The tasks for this exercised are outlined below. You will complete the tasks and answer questions that pertain to those tasks. Read the tasks AND the questions before you begin the exercise! Answers to some of the questions may be a part of the task or involve a computer response.

1. Open and log in to EDconn32.

Step	Action
1	From the taskbar, click **Start/Programs**. Then select the **EDconn32** program group and **Edconn32 (Unit 2, Lesson 5)**.
2	Type the User ID: **Jane**.
3	Type the Password: **Jane123**.
4	Click **OK**.
5	Click **OK** to close the Tip of the Day.

2. Review the Mailbox Query.

3. Move any records in the Mailbox Query to the Transmission Queue.

Step	Action
1	From the toolbar, click the **Mailbox Query** icon.
2	Click the checkbox for each record in the Move to TQ column.
3	Click the **Save** icon on the toolbar.
4	Click the **Transmission Queue** icon on the toolbar.

4. Transmit any created Request for data.

5. Record your activity in the Transmission Processing Log.

6. Review the Activity Log.

Step	Action
1	Click the close (x) button to close the Transmission box.
2	Click **Activity Log** icon on the toolbar.
3	Click the **Horizontal scroll** bar to scroll to the right.
4	When you are finished reviewing the Activity Log, click the close (x) button to exit EDconn32.

Lesson 5 Exercise, continued

1. If any batches were in the Mailbox Query, how did they get there?

2. What are the steps to move a record from the Mailbox Query to the Transmission Queue?

3. If any Requests were created, what were the types of data in the files being requested?

4. How many records in the Activity Log indicate a Start of Transmisson?

5. When was the last application batch transmitted?

6. How can you easily identify the type of activity in each record?

More Thinking

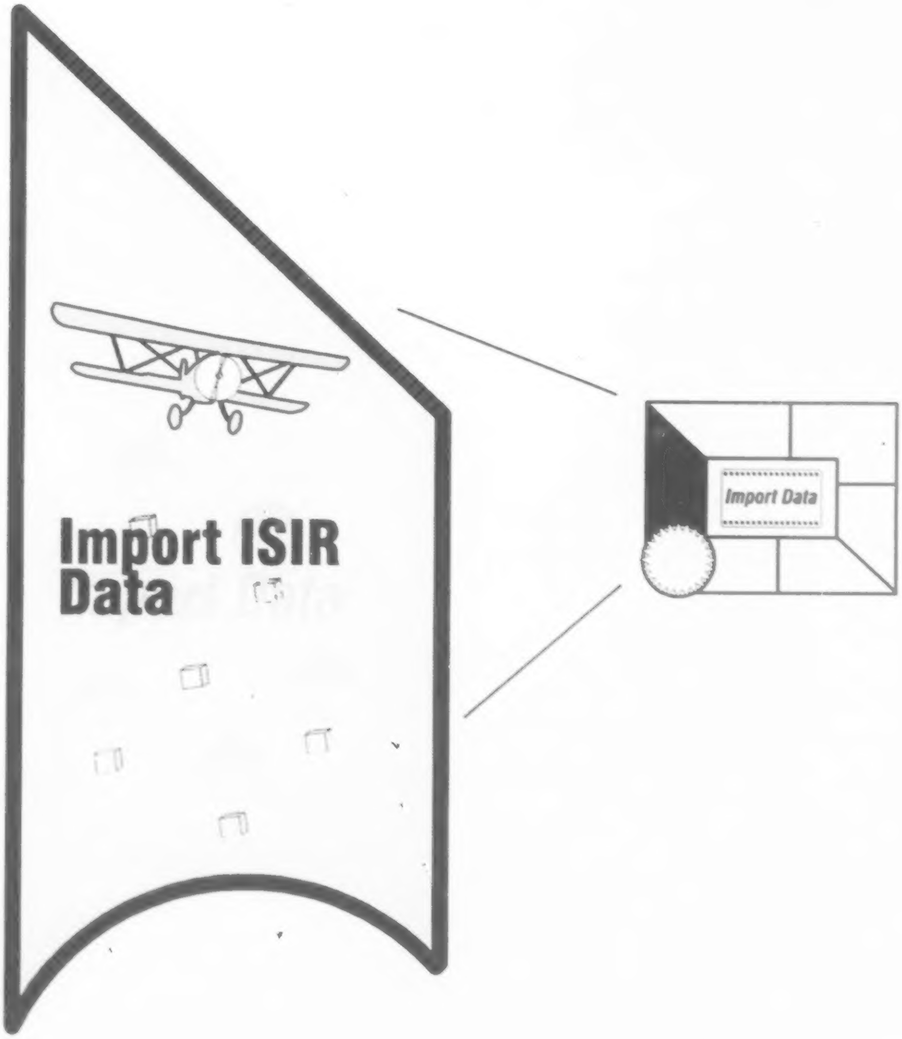
How are electronic app ISIRs different from automatic ISIRs?

Lesson 6 – Import Data

Objectives

At the end of this lesson you should be able to:

1. Use the import function to add ISIR data to the EDExpress database.


Import ISIR Data
Import Data

Importing ISIR Data

Data processed by the CPS is sent to you over the Student Aid Internet Gateway (SAIG) in the form of an Institutional Student Information Record (ISIR). An ISIR is produced as a result of something you did, or something the student or another institution did. Each time you create and submit an initial application, correction, or duplicate request, you will receive a corresponding processed ISIR. The message class or file name identifies each ISIR.

An ISIR may also be sent to you automatically depending on the actions of the student, another school, or another agency. For example, if students list your federal school code on their FAFSA, you will receive ISIRs for those students. An automatic ISIR may also be created from a paper correction submitted by a student or an electronic correction submitted by another school. These automatic ISIRs are created from applications submitted through:

- FAFSA Express
- FAFSA on the Web/Renewal FAFSA on the Web
- A paper FAFSA or renewal FAFSA entered by a Multiple Data Entry point (MDE)
- An application entered at another school
- System generation by CPS (including records created as a result of NSLDS post-screening)

After you retrieve the data from the network using Edconnect, you will import the batches into EDExpress using the following process.

Electronic App ISIR

*Select **File/Import** from the menu bar*

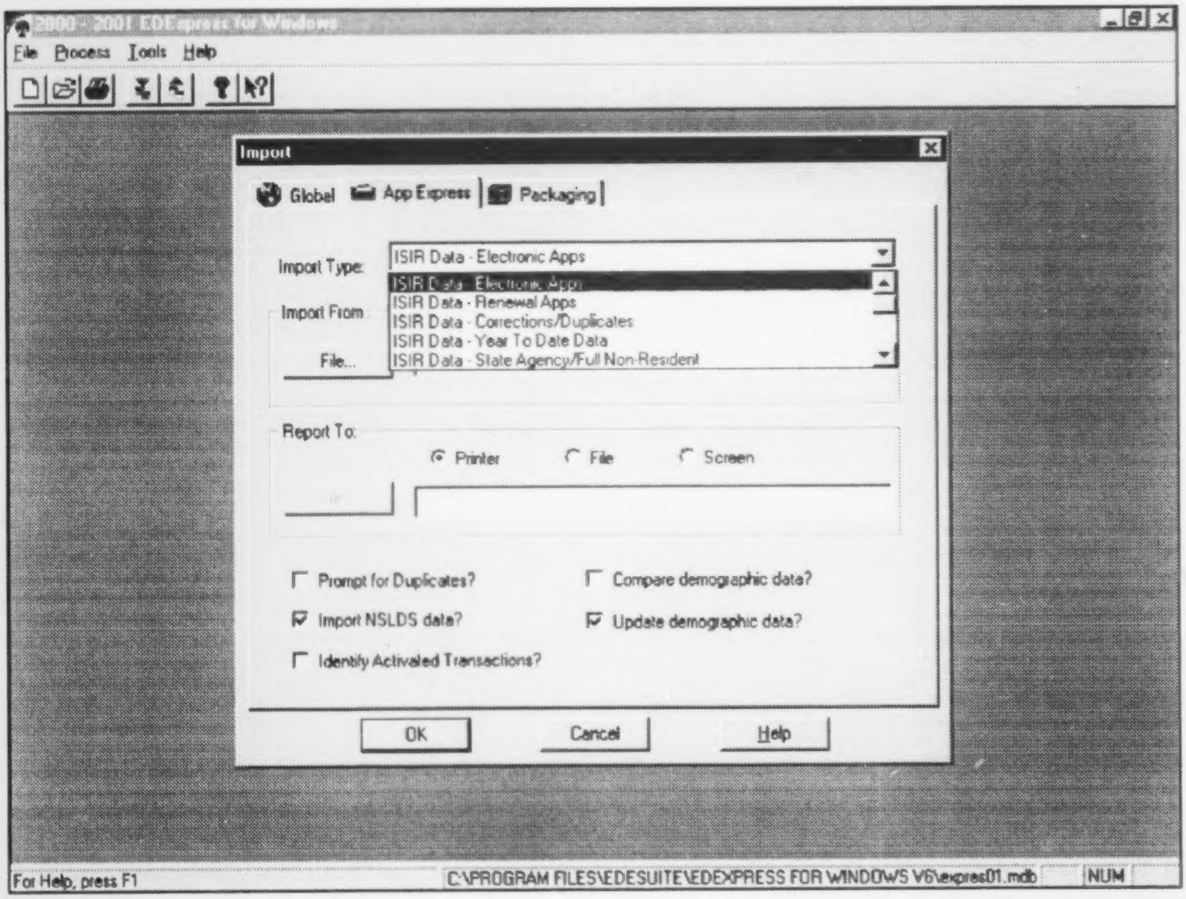
*Click the **App Express** tab*

*The Import Type field allows you to choose exactly what type of ISIR data (i.e., electronic app, automatic) you want to import. Select **ISIR Data – Electronic Apps** from the drop-down list*

The message class filename and location are listed in the Import From field.

The import files are stored in the location you defined in the Edconnect Setup or EDExpress (Tools/Setup/Global/File Management).

The file location should ba a common one between both EDconn32 and EDExpress.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
Import From
File...
OK
Cancel
Help

Import Type: ISIR Data - Electronic Apps

ISIR Data - Electronic Apps
ISIR Data - Renewal Apps
ISIR Data - Corrections/Duplicates
ISIR Data - Year To Date Data
ISIR Data - State Agency/Full Non-Resident

Report To: ● Printer ○ File ○ Screen

☐ Prompt for Duplicates?
☐ Compare demographic data?
☑ Import NSLDS data?
☑ Update demographic data?
☐ Identify Activated Transactions?

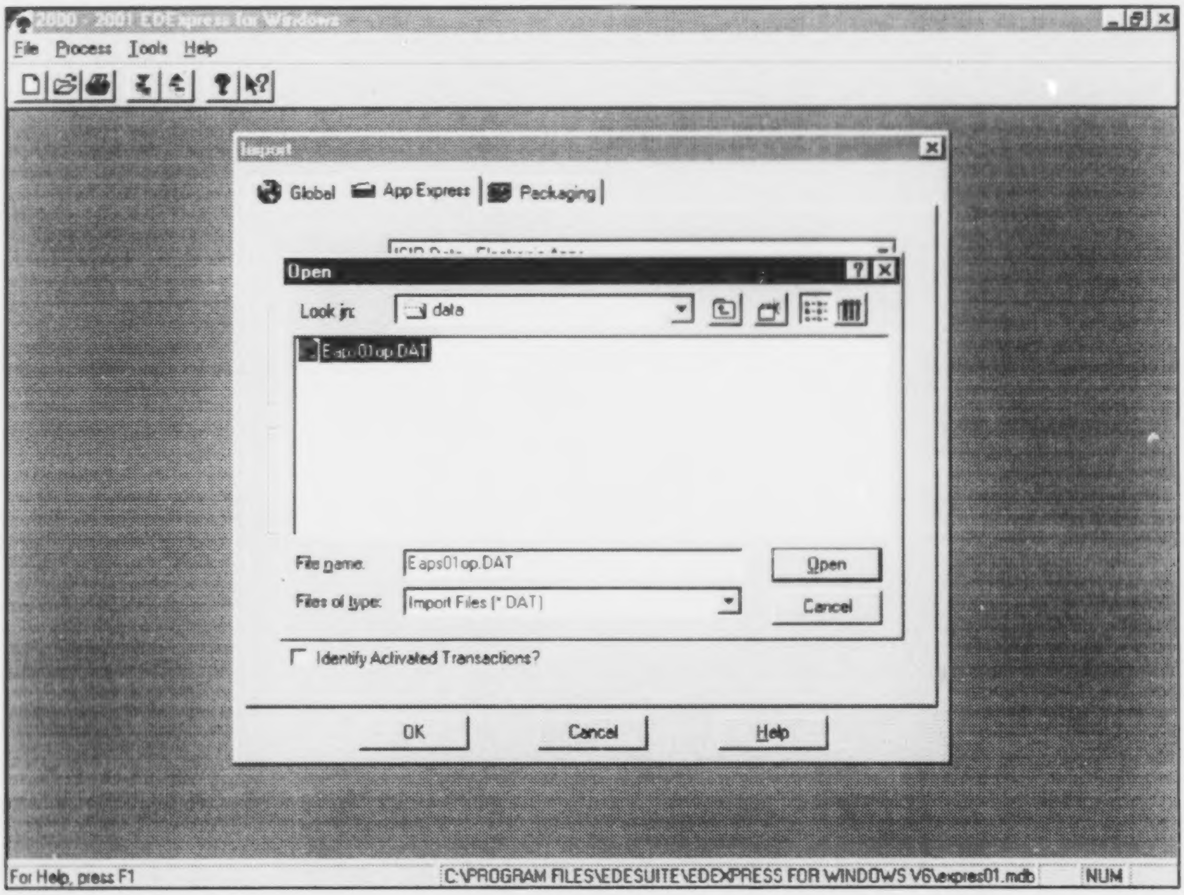
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

The import files are listed in the identified directory.

Click on the ***File*** *button to select the file you will import.*

Review the files and click on the file to be imported.

Click ***Open*** *to select the file and return to the import screen.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
Open
OK
Cancel
Help
Open
Cancel

Look in: data

Eaps01op.DAT

File name: Eaps01op.DAT

Files of type: Import Files (*.DAT)

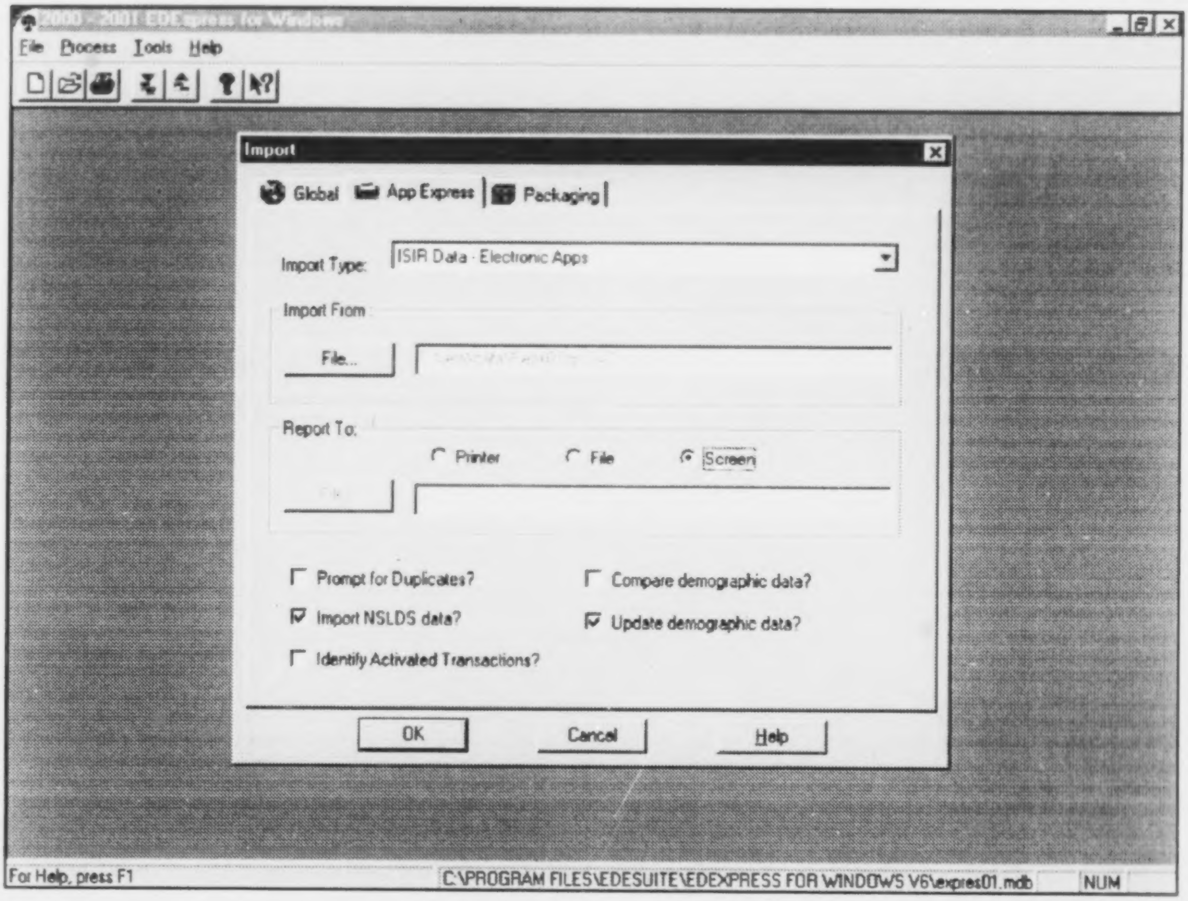
☐ Identify Activated Transactions?

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

*Click the **Printer, File, or Screen** button in the Report To field to select an output destination for the edit report. If you select File, review the file name in the Report To File field to change, if necessary.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Import
Global
App Express
Packaging
File...
OK
Cancel
Help

Import Type: ISIR Data - Electronic Apps

Import From

Report To: ○ Printer ○ File ● Screen

☐ Prompt for Duplicates?
☑ Import NSLDS data?
☐ Identify Activated Transactions?
☐ Compare demographic data?
☑ Update demographic data?

For Help, press F1 | C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb | NUM

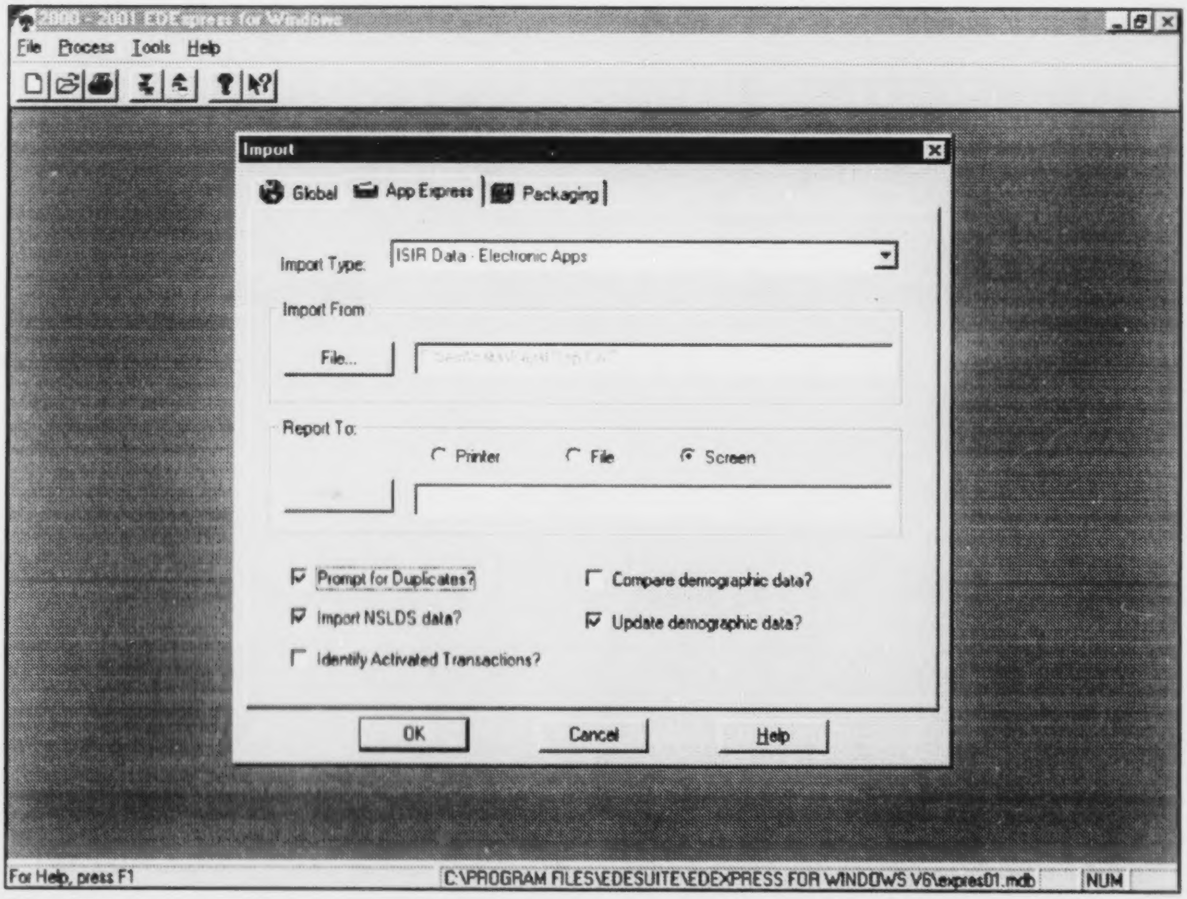
The Prompt for Duplicates feature allows you to pause the import process when a duplicate is found. Whether you select this option or not, the duplicate will be skipped during the import process.

Click on the ***Prompt for Duplicates*** *button to display any duplicate records found during import.*

Click on the ***Import NSLDS Data*** *button to import that data.*

If you want the import to compare or update demographic data, click the appropriate boxes.

Click ***OK***.



2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
File...
OK
Cancel
Help

Import Type: ISIR Data - Electronic Apps

Import From

Report To: ○ Printer ○ File ● Screen

☑ Prompt for Duplicates?
☑ Import NSLDS data?
☐ Identify Activated Transactions?
☐ Compare demographic data?
☑ Update demographic data?

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

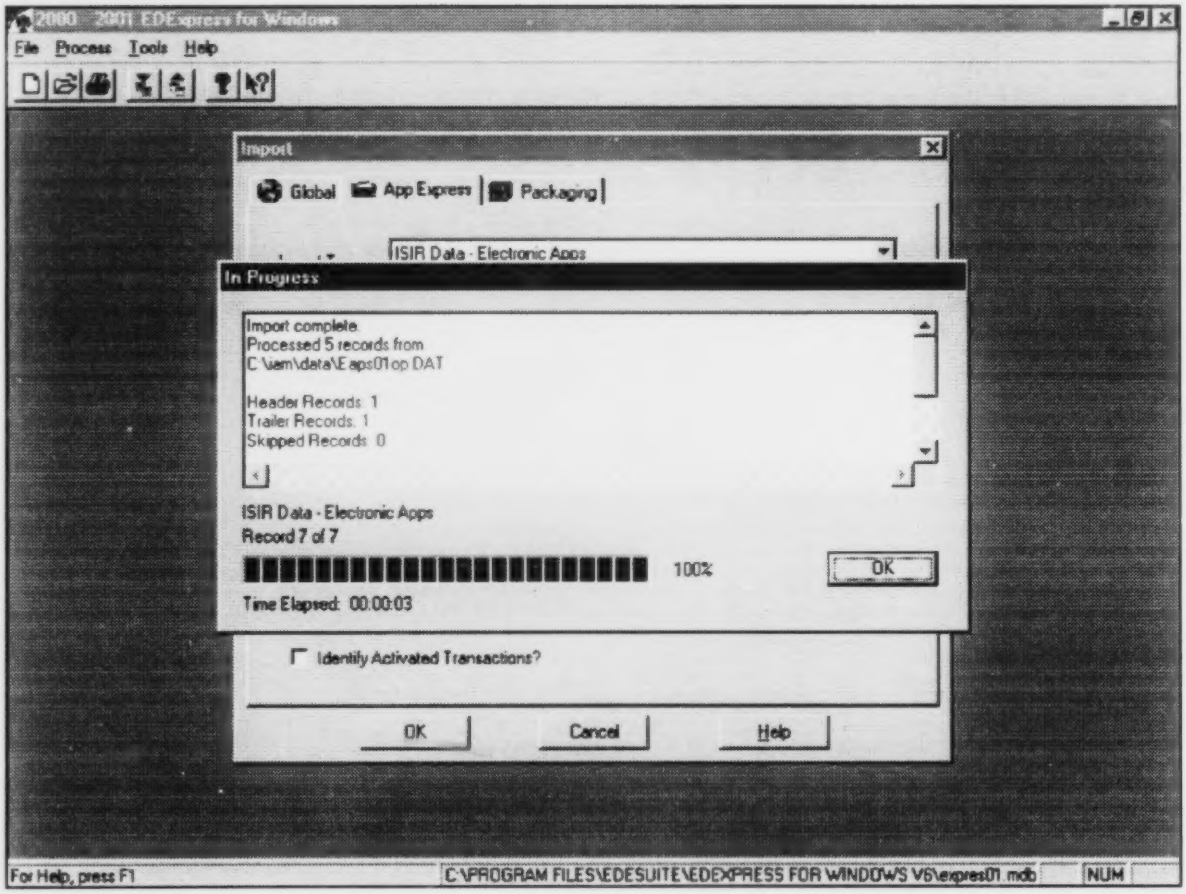
NUM

Use the scroll bar to see all the import data.

When the import is complete, a batch report displays statistics about the imported data.

The names of all imported files are changed from OP to BK so they will be filtered from the Import File pick list the next time you need to import a file of this type.

The file still exists and can be re-imported if necessary.


2000 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
In Progress
OK
☐ Identify Activated Transactions?
OK
Cancel
Help
For Help, press F1
NUM

ISIR Data - Electronic Apps

```
Import complete.
Processed 5 records from
C:\iam\data\Eaps01op.DAT

Header Records: 1
Trailer Records: 1
Skipped Records: 0
```

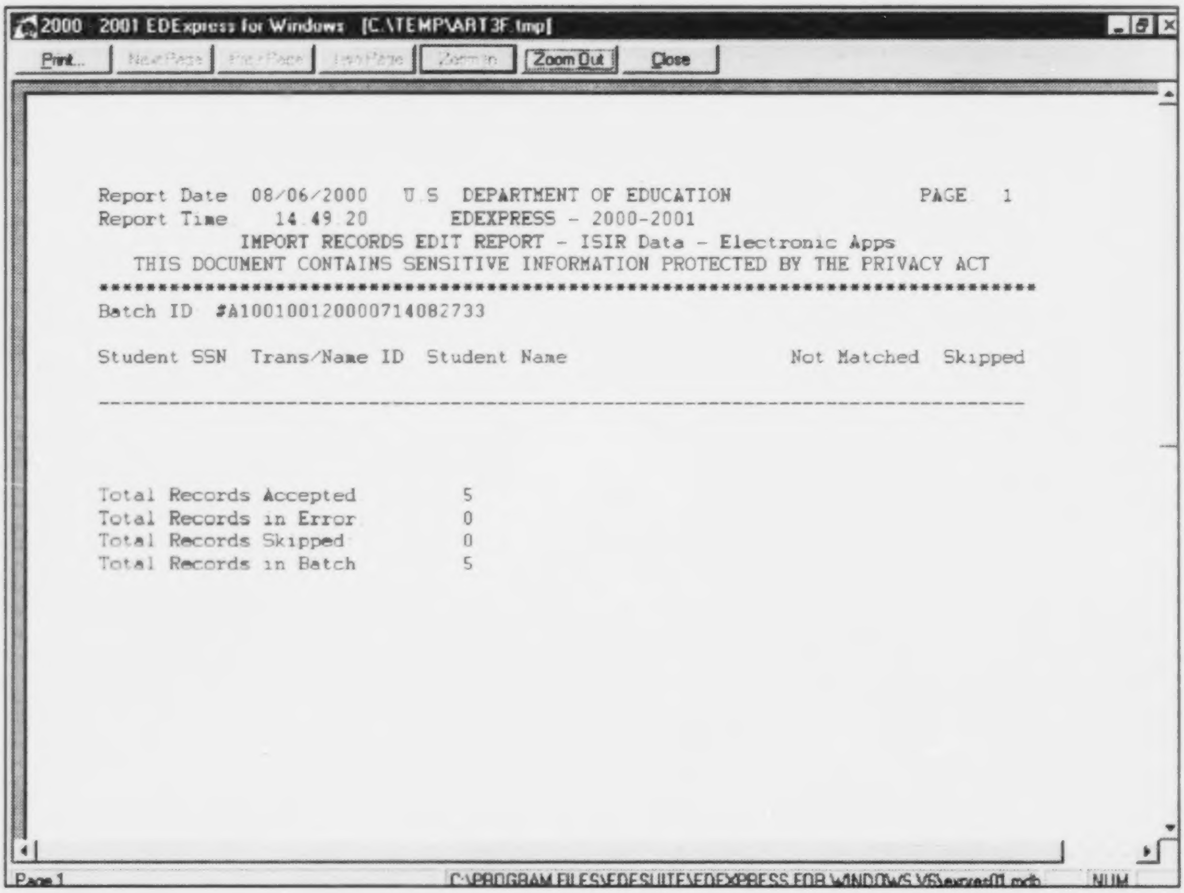
ISIR Data - Electronic Apps
Record 7 of 7
100%
Time Elapsed: 00:00:03

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

The Import Records Edit Report displays the Batch ID as well as statistics about the imported batch. In this case, 5 records were added to the database.

Tip: An Edit report is generated each time you import data into EDExpress. If you want to save a copy of the report, select File or Printer as the Report To: destination in the Import dialog box.

*Click the **Close** button to close the report.*


2000 2001 EDExpress for Windows [C:\TEMP\ART3F.tmp]
Print...
Next Page
Prev Page
Last Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

```
Report Date  08/06/2000   U S  DEPARTMENT OF EDUCATION               PAGE   1
Report Time    14 49 20       EDEXPRESS - 2000-2001
            IMPORT RECORDS EDIT REPORT - ISIR Data - Electronic Apps
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*****************************************************************************
Batch ID  #A100100120000714082733

Student SSN  Trans/Name ID  Student Name                     Not Matched  Skipped

-----------------------------------------------------------------------------



Total Records Accepted        5
Total Records in Error        0
Total Records Skipped         0
Total Records in Batch        5
```

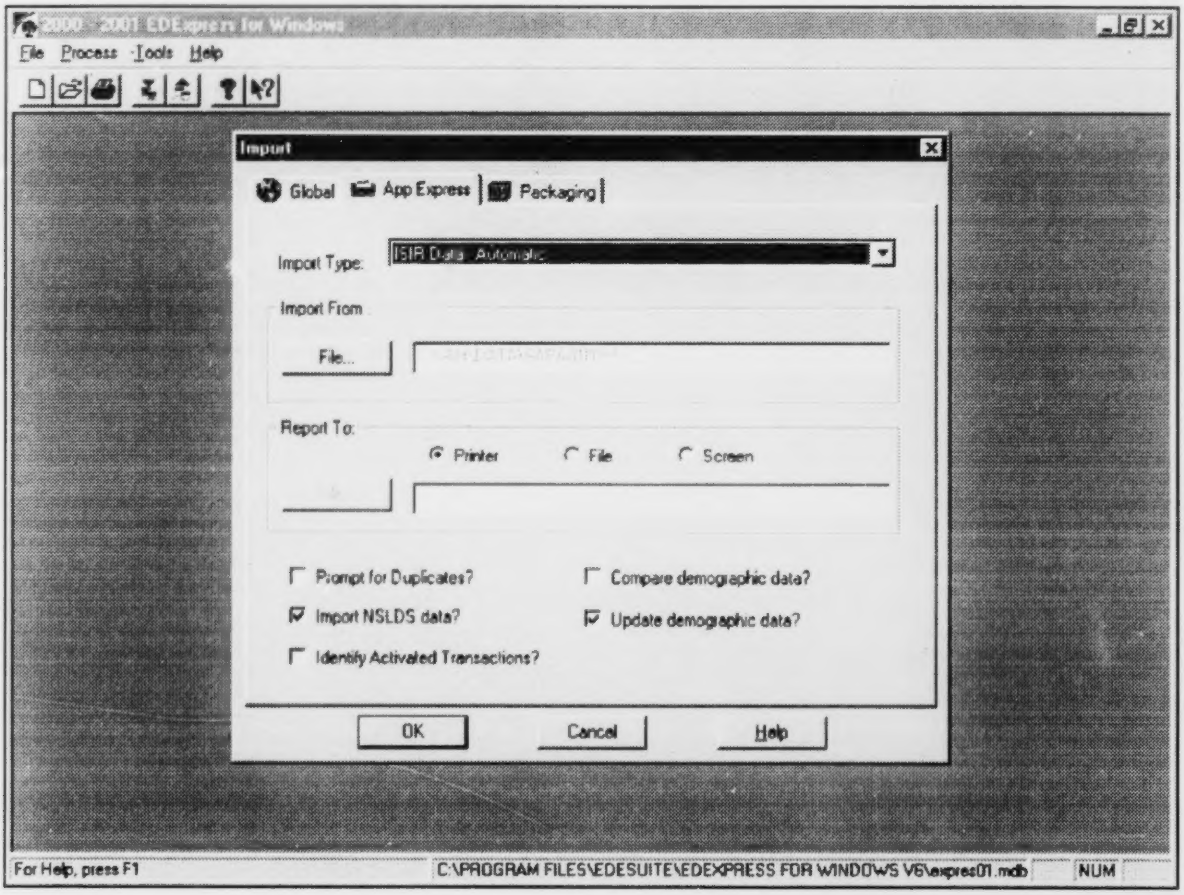
Automatic ISIR

*Select **File/Import** from the menu bar to begin the automatic ISIR import.*

*Click **File** to select the automatic ISIR file from the iam/data directory.*

*Select the **Import file** and click **Open**.*

Importing an Automatic ISIR is basically the same as importing an electronic application ISIR, but the file you select will be different.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
File...
OK
Cancel
Help

Import Type: ISIR Data - Automatic

Report To: ● Printer ○ File ○ Screen

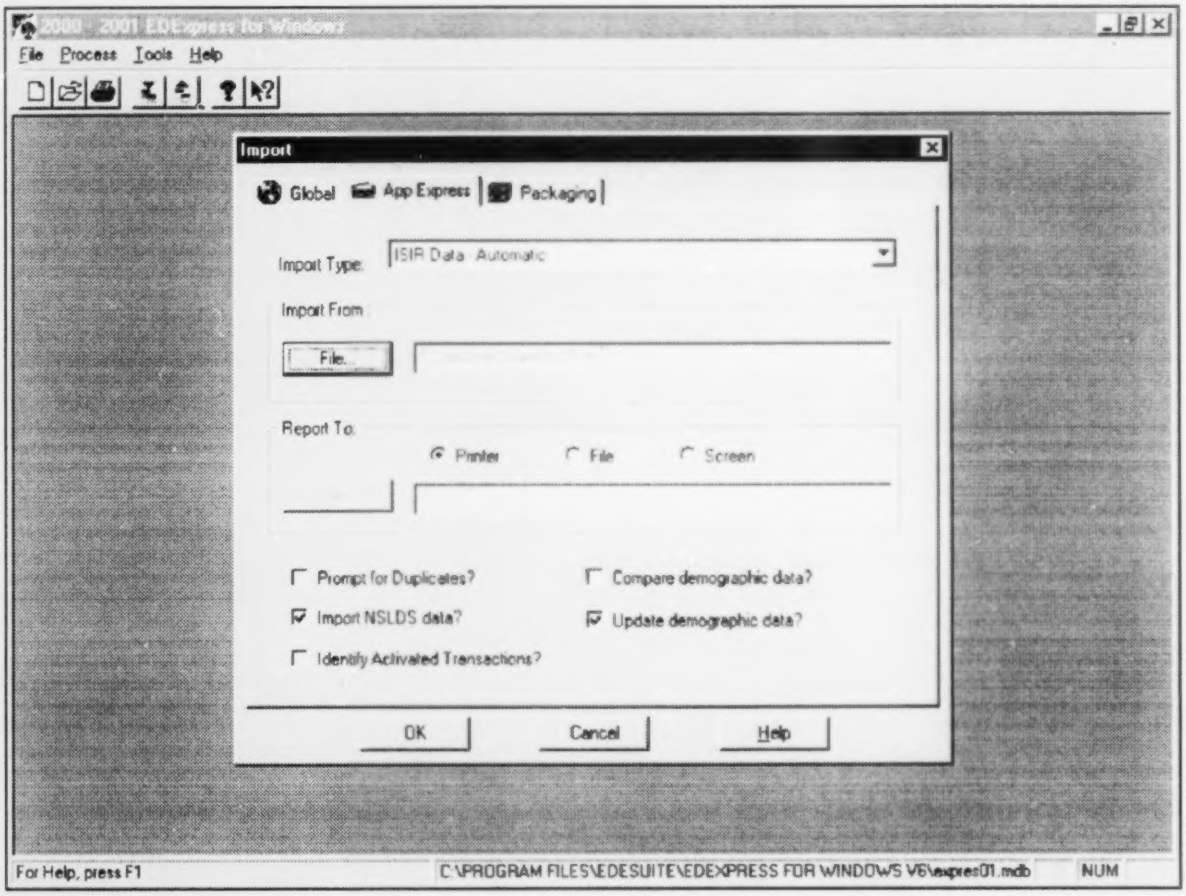
☐ Prompt for Duplicates?
☑ Import NSLDS data?
☐ Identify Activated Transactions?
☐ Compare demographic data?
☑ Update demographic data?

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

The final step is to select your Report To destination and determine if you want to select any of the options at the bottom of the screen.

Select Screen as the ***Report To*** *destination*

Click ***OK***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
OK
Cancel
Help

Import Type: ISIR Data Automatic

Import From: File...

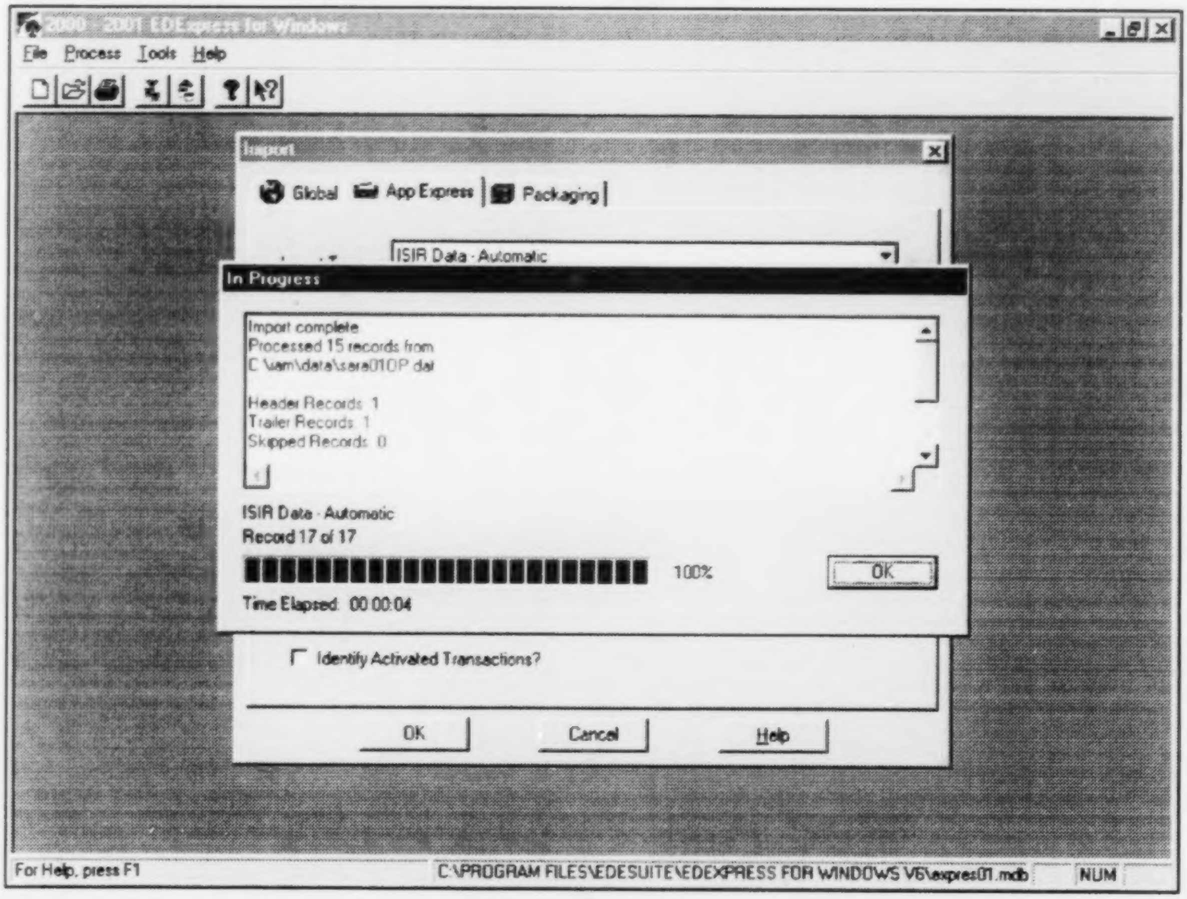
Report To: ● Printer ○ File ○ Screen

☐ Prompt for Duplicates?
☑ Import NSLDS data?
☐ Identify Activated Transactions?
☐ Compare demographic data?
☑ Update demographic data?

For Help, press F1 | C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb | NUM

*Click **OK***

The batch report shows statistics about the imported data


2000 - 2001 EDExpress for Windows
File Process Tools Help
Import
Global
App Express
Packaging
ISIR Data - Automatic
In Progress
OK
☐ Identify Activated Transactions?
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

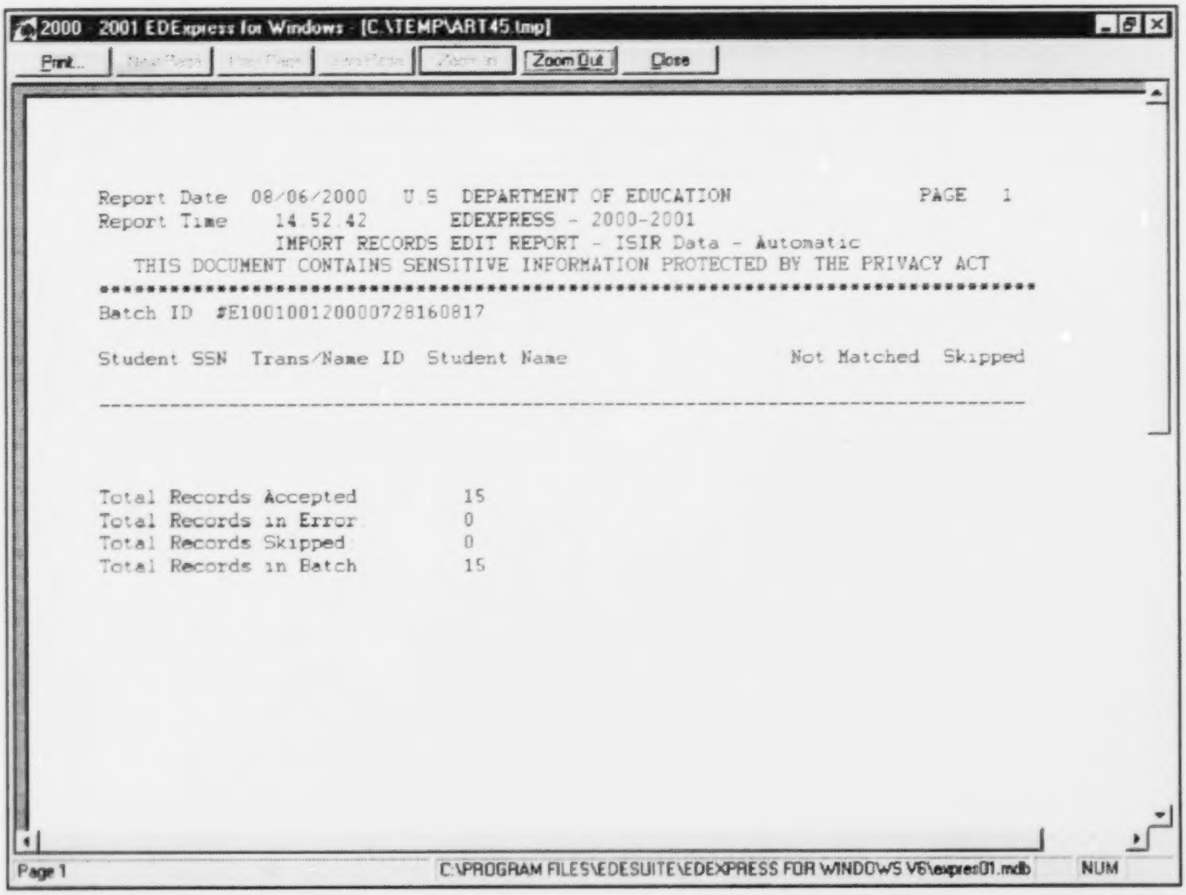
```
Import complete
Processed 15 records from
C \iam\data\sara01OP dat

Header Records  1
Trailer Records  1
Skipped Records  0
```

ISIR Data - Automatic
Record 17 of 17
100%
Time Elapsed: 00:00:04

The Import Records Edit Report displays the Batch ID as well as statistics about the import batch.

In this case, records were added to the database.

*Click on the **Close** button on the toolbar.*


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART45.tmp]
Print...
Next Page
Prev Page
Last Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

```
Report Date  08/06/2000   U.S  DEPARTMENT OF EDUCATION              PAGE   1
Report Time    14.52.42       EDEXPRESS - 2000-2001
               IMPORT RECORDS EDIT REPORT - ISIR Data - Automatic
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
****************************************************************************
Batch ID  #E100100120000728160817

Student SSN  Trans/Name ID  Student Name                  Not Matched  Skipped

----------------------------------------------------------------------------



Total Records Accepted        15
Total Records in Error        0
Total Records Skipped         0
Total Records in Batch        15
```

Lesson 6 Exercise

Scenario:

Valerie is a financial aid counselor at a college in New Hampshire. One of her assignments is to import all ISIR data from the CPS mailbox. It is on her processing schedule to import all electronic app ISIR data today.

Exercise Instructions:

The tasks for this exercised are outlined below. You will complete the tasks and answer questions that pertain to those tasks. **Read the tasks AND the questions before you begin the exercise! Answers to some of the questions may be a part of the task or involve a computer response.**

Complete the import using the steps outlined below:

Step	Action
1	Select **File/Import** from the menu bar.
2	Click on the **App Express** tab.
3	Select **ISIR Data - Electronic Apps** from the drop-down list in the **Import Type** field.
4	Click the **Import From: File** button. Click on the **EAPS010P.DAT** file you want to import, and click Open to return to the Import screen.
5	Select **Printer**, **File**, or **Screen** as the output destination.
6	Click OK to import the batch.
7	Click OK when you are done viewing the batch report.
8	Repeat the process to import the **SARA01OP.DAT** file.

1. What message class is used for the electronic application batches just imported?

2. How many records were accepted?

3. Were there any skipped records in the imported batch?

4. How many error records were in the imported batch?

5. What is the batch ID?

6. List the report date and time.

Lesson 6 Exercise, continued

True or False:

____ During an import, you can instruct the system to display any duplicate records found during the import.

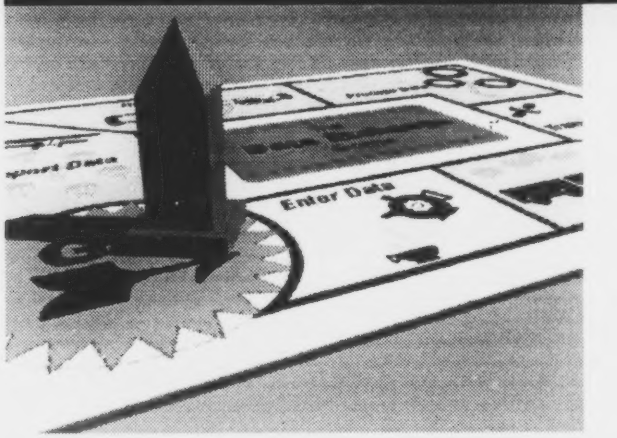
____ You cannot import NSLDS data during an ISIR import.

____ The names of all imported files are changed from OP to BK so they will be filtered from the Import File pick list.

____ The batch report displays statistics about the imported data.

____ An Edit Report is generated each time you import data into EDExpress.

Unit 3


Enter Data
Import Data

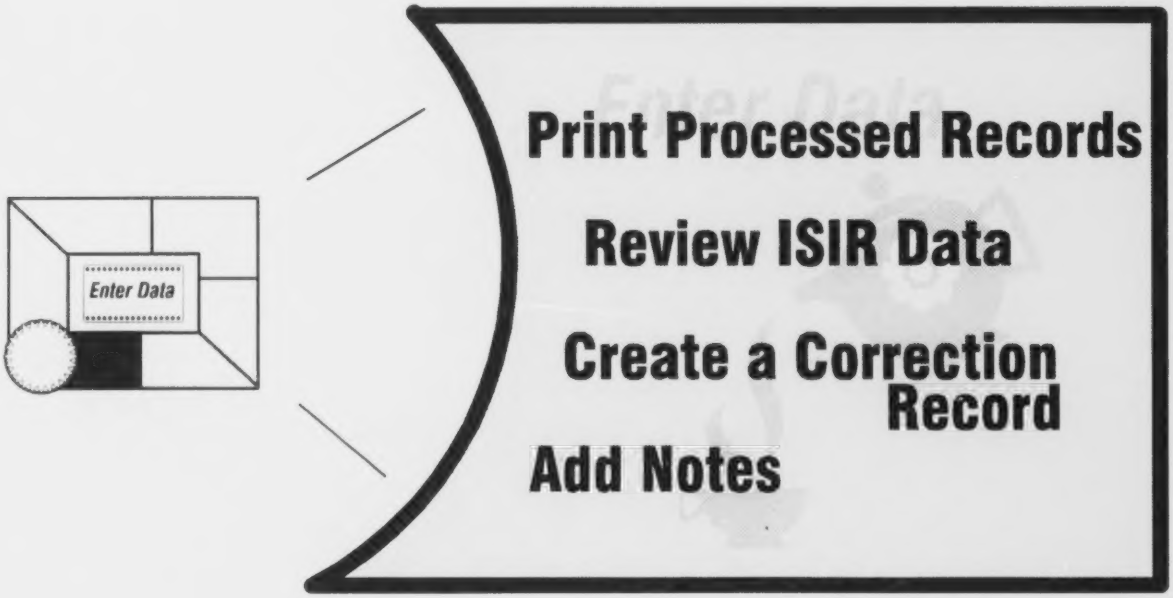
Working With ISIRs

Lesson 1 – Enter Data

Objectives

At the end of this lesson you should be able to:

1. Use the print function to print a list of processed records.
2. Use the print function to print multiple ISIRs, including comment text.
3. Review a record and add a document to be requested.
4. Identify rejected data.
5. View and interpret messages related to the ISIR.
6. Create a correction record using:
    - The ISIR tab
    - The Quick Correction feature
    - The Verification Worksheet
7. Use the Notes function.


Enter Data
Enter Data
Print Processed Records
Review ISIR Data
Create a Correction Record
Add Notes

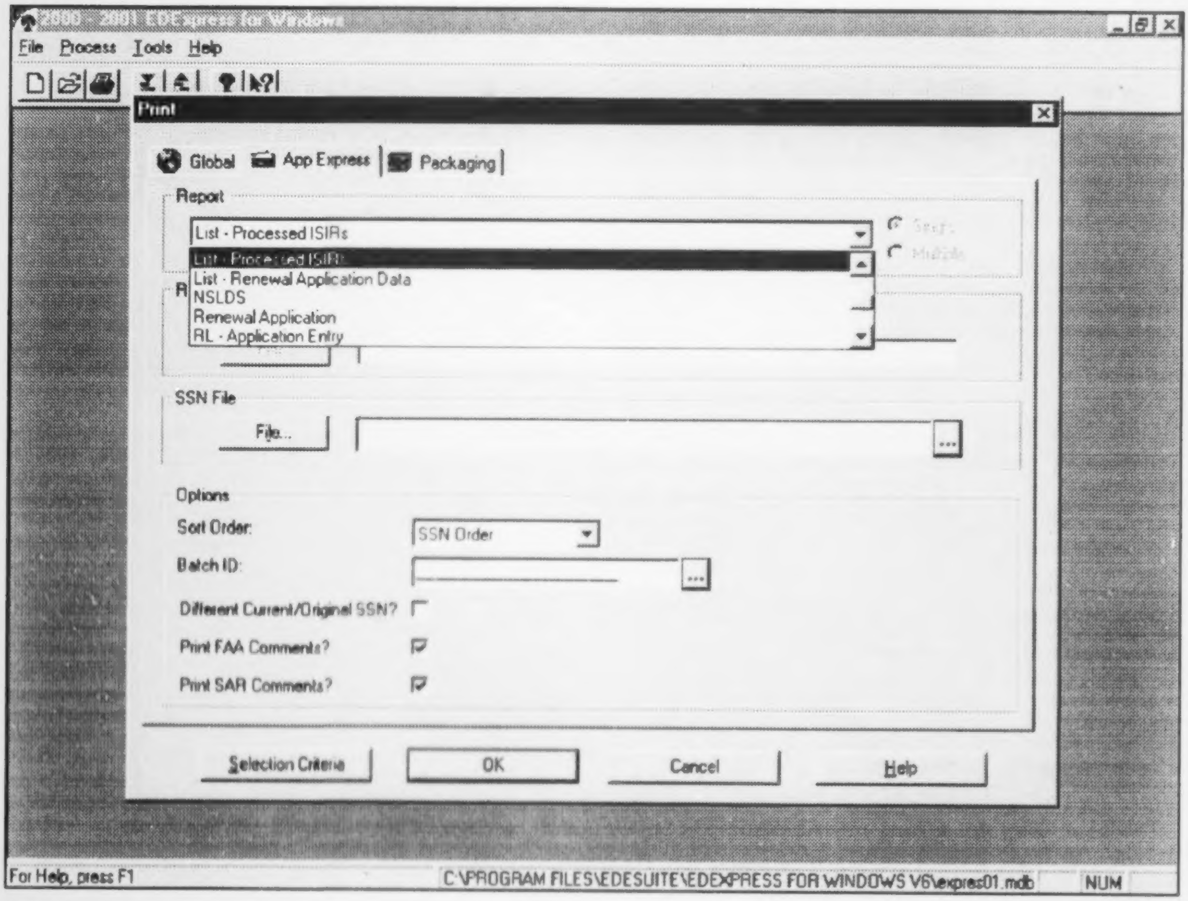
Printing a List of Processed Records

You just imported a batch of records. Do you know which students were included? How can you find out? After you import a batch of processed ISIRs, you may want to print a list of the records contained in the batch.

*Select **File/Print/App Express** from the menu bar.*

Click the down arrow in the Report field to display a list of items that you can print.

*Select **List – Processed ISIRs**.*



Report: List - Processed ISIRs

- List - Processed ISIRs
- List - Renewal Application Data
- NSLDS
- Renewal Application
- RL - Application Entry

Options

Sort Order: SSN Order

Batch ID:

Different Current/Original SSN? ☐

Print FAA Comments? ☑

Print SAR Comments? ☑

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Single
Multiple
SSN File
File...
Selection Criteria
OK
Cancel
Help
NUM

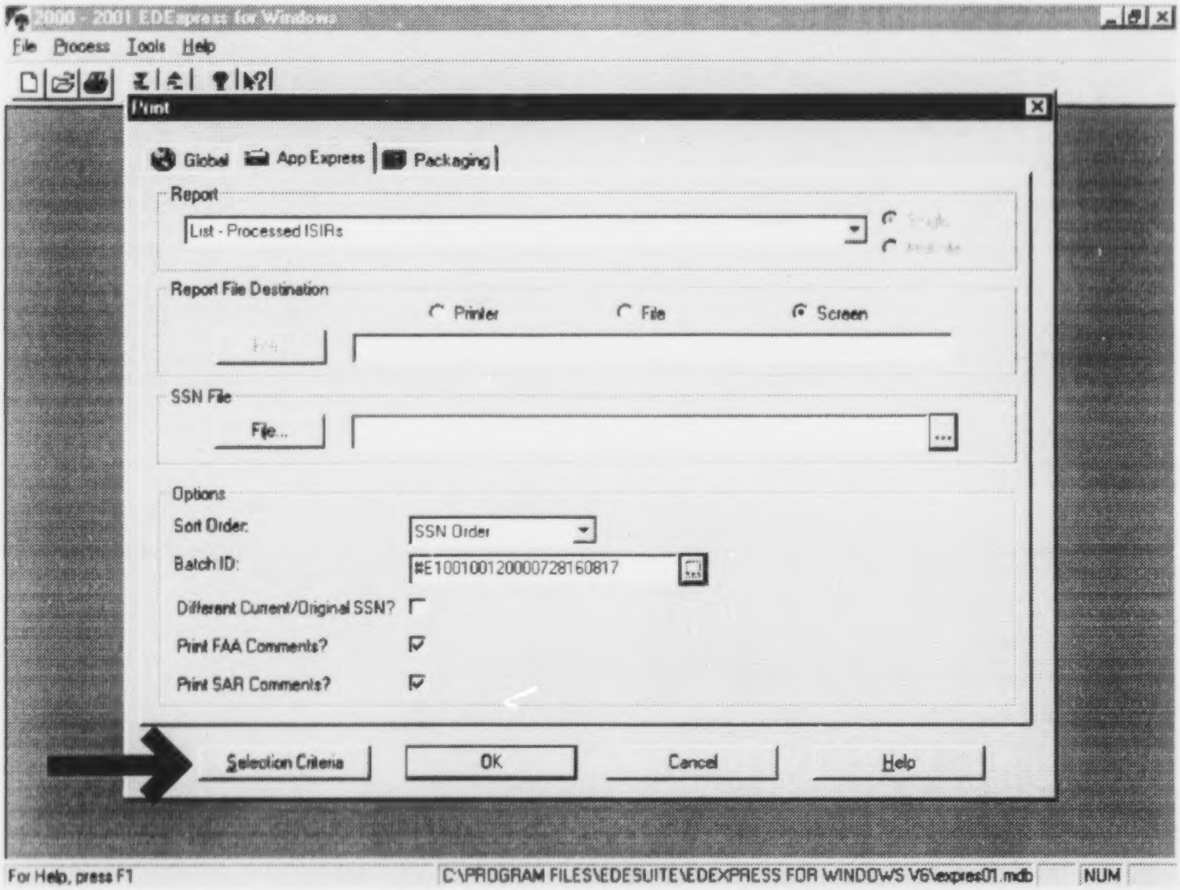
*Click **Printer** to print the list. If output is to a file, click the **File** button to locate and name the file, and then click **OK**. Click **Screen** to view the list on the PC screen.*

*You can also sort records by last name or SSN using the **Sort Order** option.*

*Click on the **Selection Criteria** button at the bottom of the screen to select a specific group of records.*

You can send the list to the printer, save it as a file, or view it on the screen.

The Batch ID field is used to identify which batch of ISIRs to print. You enter the batch ID field, or click on the ellipsis button next to the field and select the batch.


2000 - 2001 EDExpress for Windows
File Process Tools Help
Print
Global App Express Packaging
File...
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Report: List - Processed ISIRs

Report File Destination: ○ Printer ○ File ● Screen

Options

Sort Order: SSN Order

Batch ID: #E100100120000728160817

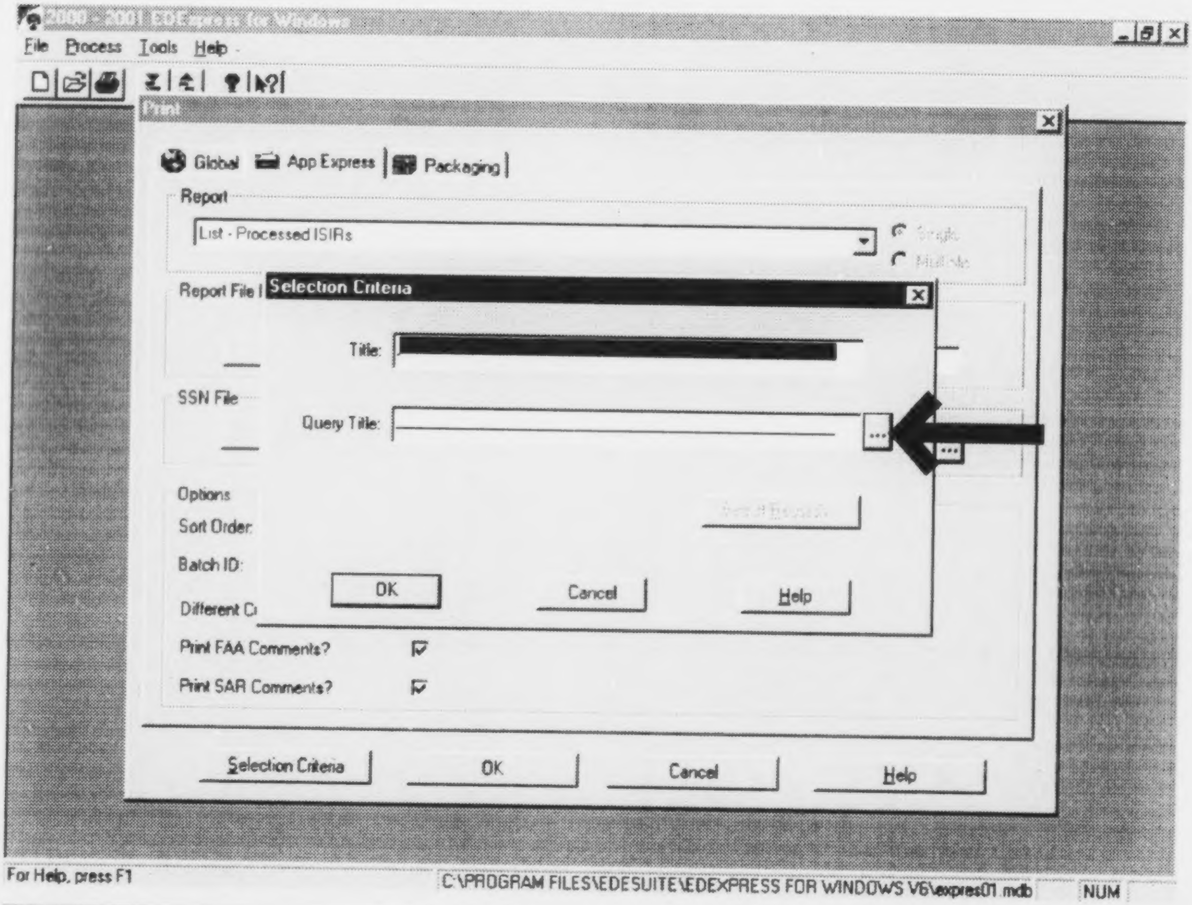
Different Current/Original SSN? ☐

Print FAA Comments? ☑

Print SAR Comments? ☑

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Click the ***ellipsis*** *button next to the* ***Query Title*** *field to see a list of queries.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Print
Global
App Express
Packaging
Report
Single
Multiple
Report File
SSN File
Options
Sort Order:
Batch ID:
Different C
Selection Criteria
OK
Cancel
Help
Select Records
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

List - Processed ISIRs

Title: [redacted]

Query Title:

Print FAA Comments? ☑

Print SAR Comments? ☑

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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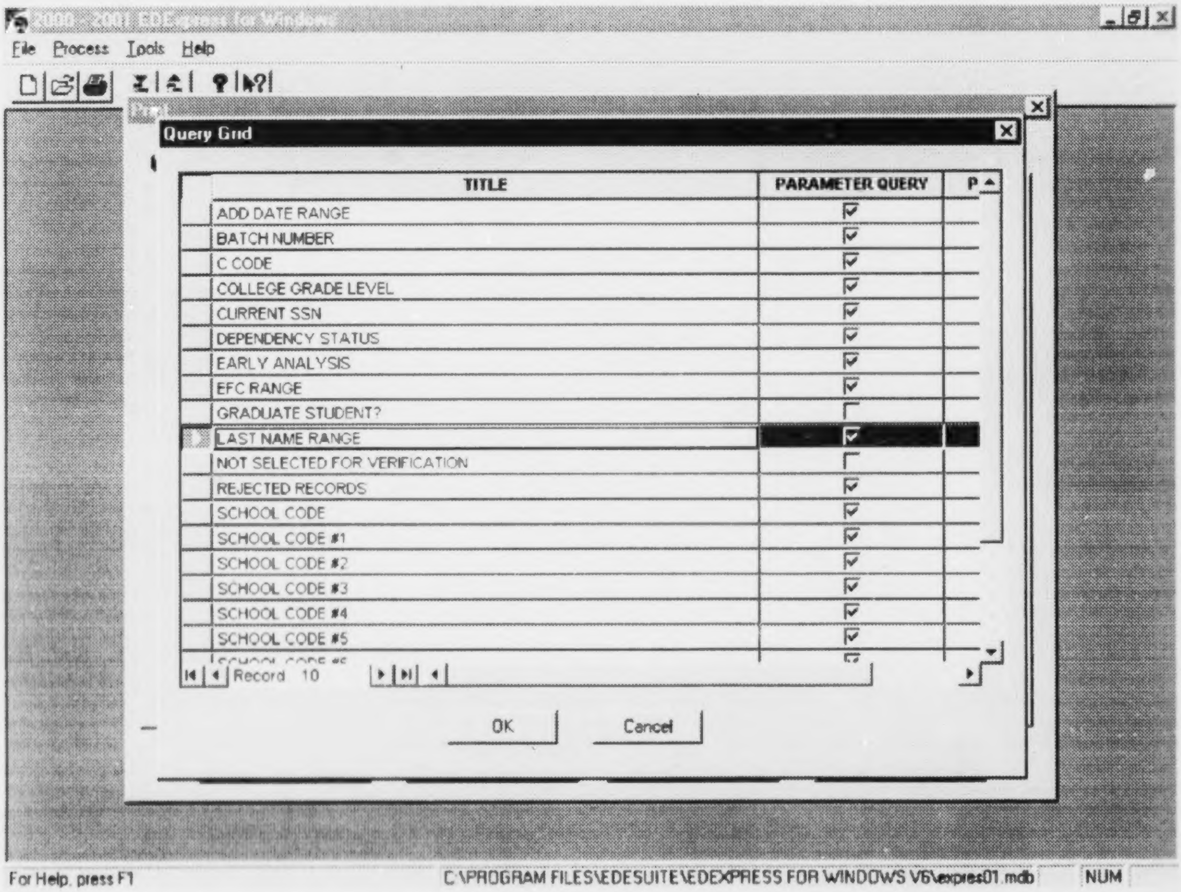
Select ***Last Name Range***.

The Query grid shows all the queries in your database. In this example, we will select Last Name Range. A Financial aid counselor would use this query if they are responsible for specific letters of the alphabet, such as A-M. Using this query will provide them with the records within the batch that fall within the specified range.



TITLE	PARAMETER QUERY	P
ADD DATE RANGE	☑	
BATCH NUMBER	☑	
C CODE	☑	
COLLEGE GRADE LEVEL	☑	
CURRENT SSN	☑	
DEPENDENCY STATUS	☑	
EARLY ANALYSIS	☑	
EFC RANGE	☑	
GRADUATE STUDENT?	☐	
LAST NAME RANGE	☑	
NOT SELECTED FOR VERIFICATION	☐	
REJECTED RECORDS	☑	
SCHOOL CODE	☑	
SCHOOL CODE #1	☑	
SCHOOL CODE #2	☑	
SCHOOL CODE #3	☑	
SCHOOL CODE #4	☑	
SCHOOL CODE #5	☑	

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

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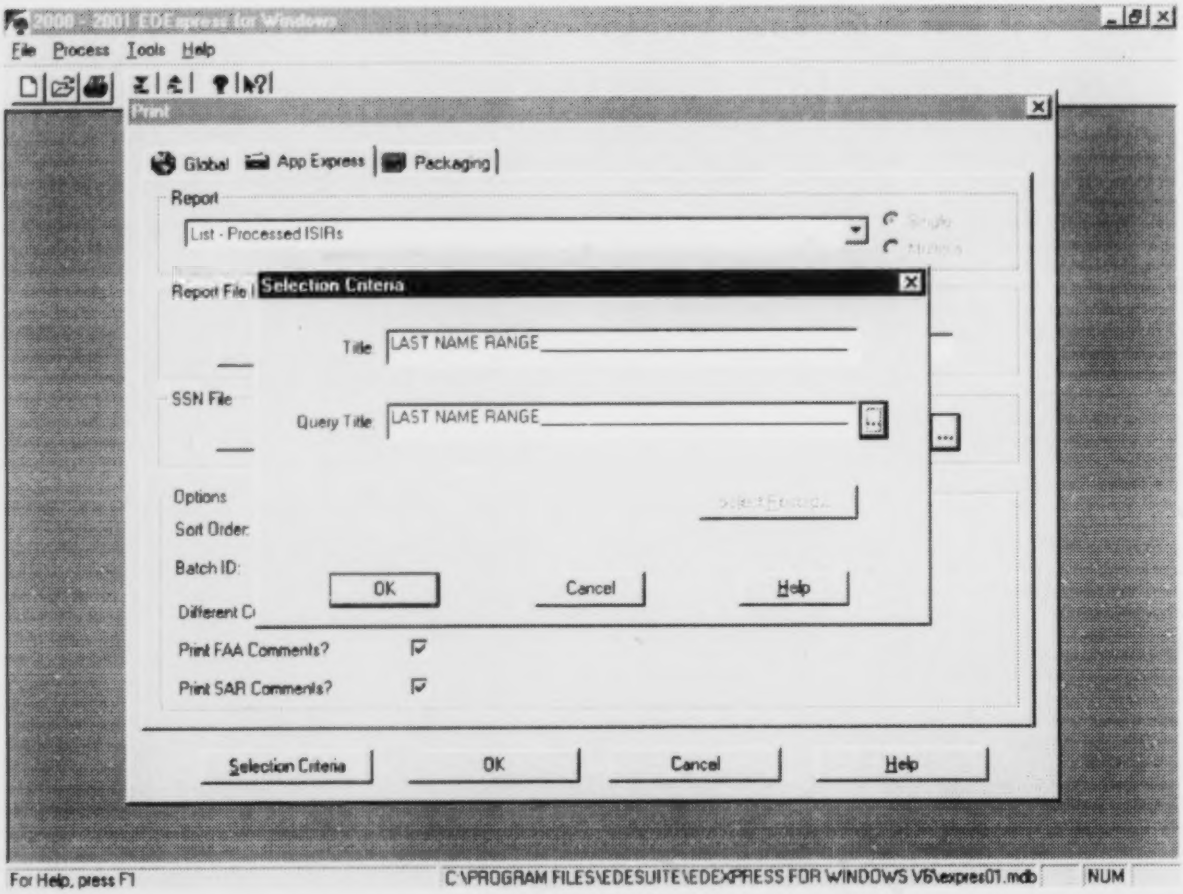
The Last Name Range query has been added as the selection criteria

Click ***OK***



2000 - 2001 EDExpress for Windows

Print

Report: List - Processed ISIRs

Selection Criteria

Title: LAST NAME RANGE

Query Title: LAST NAME RANGE

Print FAA Comments? ☑

Print SAR Comments? ☑

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

File
Process
Tools
Help
Global
App Express
Packaging
Single
Multiple
Report File
SSN File
Options
Sort Order
Batch ID:
Different C
Select Records
OK
Cancel
Help
Selection Criteria
OK
Cancel
Help
NUM

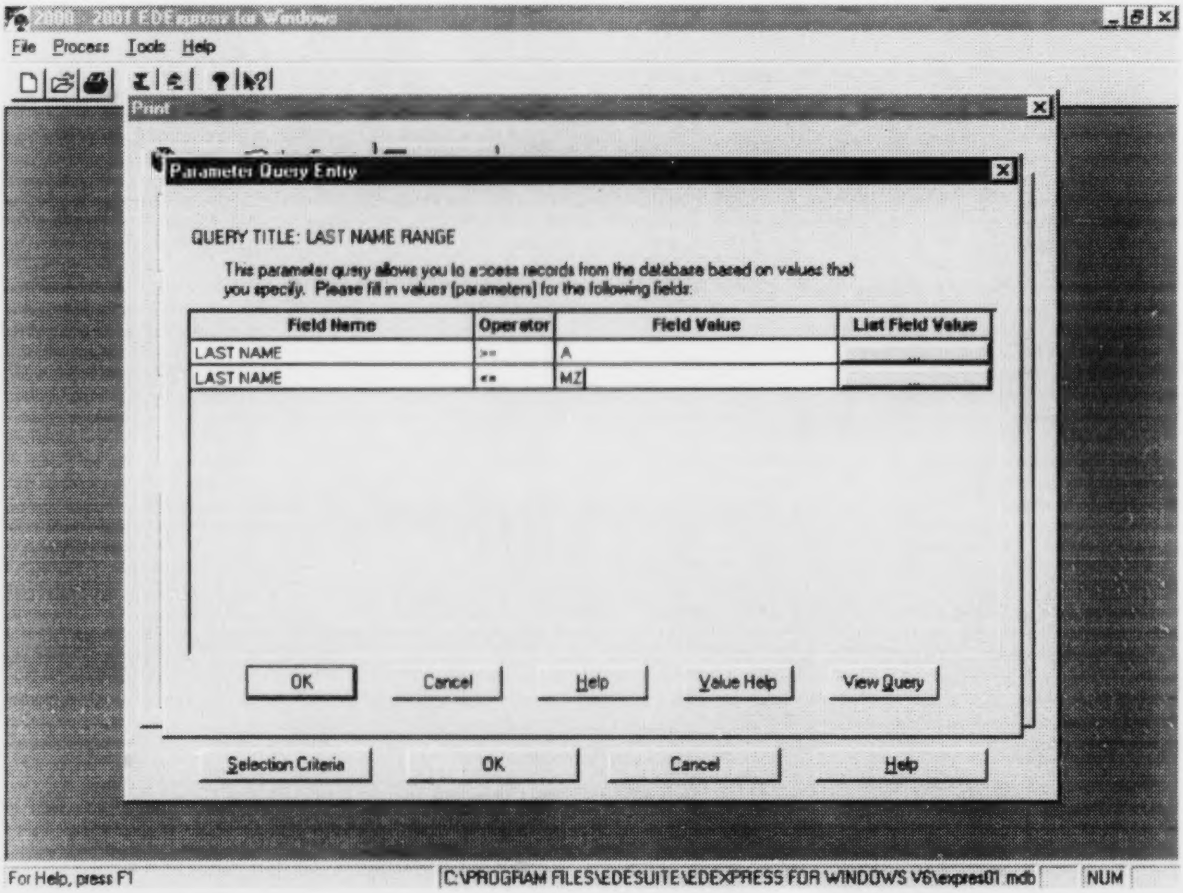
*Enter **A** in the first Field Value field.*

*Enter **MZ** in the second Field Value field.*

*Click **OK***

EDExpress assigns the Field Name and Operator based on your selections. The number you enter as the Field Value will complete the query. In this case, the letter A is the value for the first field and the letter MZ is the value for the second field. This instructs the system to print only ISIRs for the last names that fall in the A-M range.

Tip: Use Z as the last letter for the 2nd value, to include all names that are within that letter. For example: AZ for all names starting with the letter A.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Parameter Query Entry

QUERY TITLE: LAST NAME RANGE

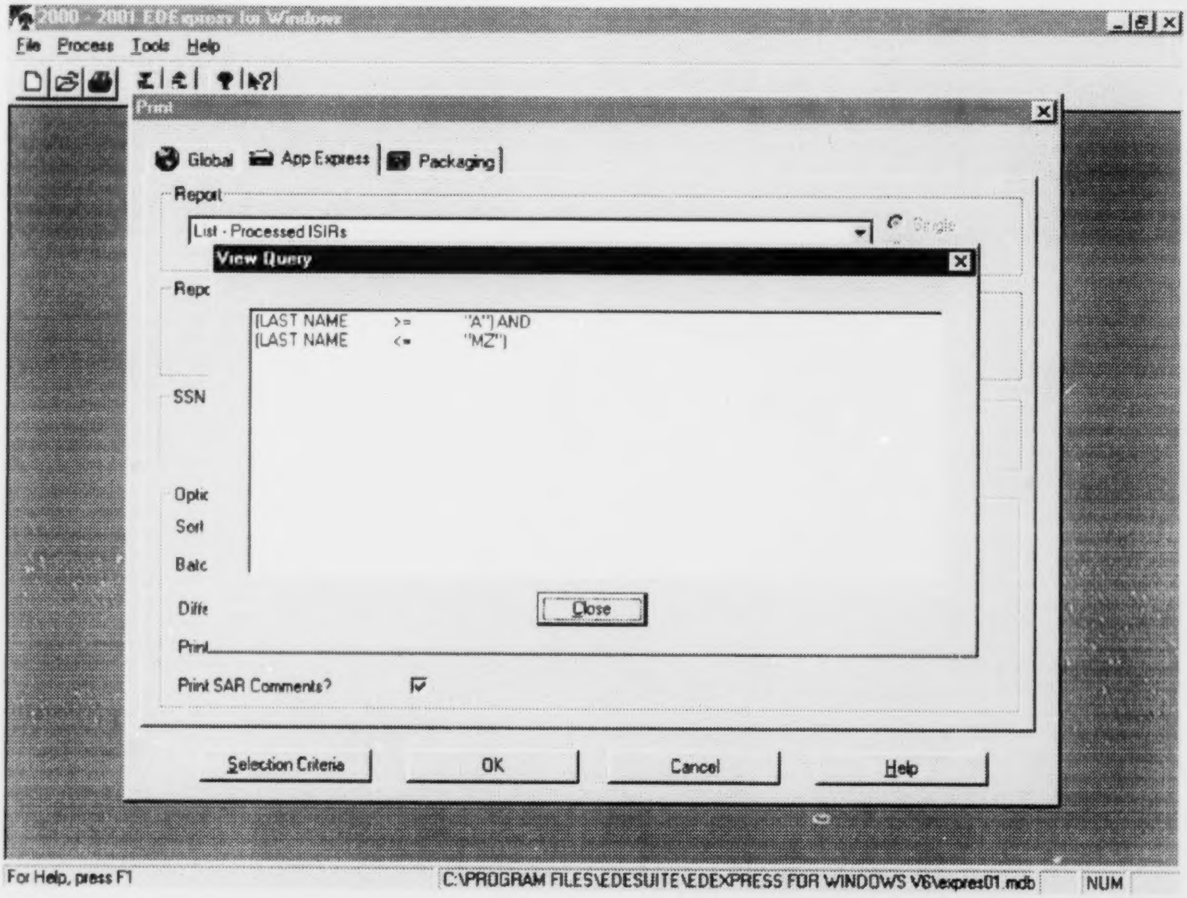
This parameter query allows you to access records from the database based on values that you specify. Please fill in values (parameters) for the following fields:

Field Name	Operator	Field Value	List Field Value
LAST NAME	>=	A	...
LAST NAME	<=	MZ	...

OK
Cancel
Help
Value Help
View Query
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

EDExpress shows you the completed query.

*Click **Close**.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Report
Single
Repc
SSN
Optic
Sort
Batc
Diffe
Print
View Query
Close
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

List - Processed ISIRs

```
(LAST NAME      >=        "A") AND
(LAST NAME      <=        "MZ")
```

Print SAR Comments? ☑

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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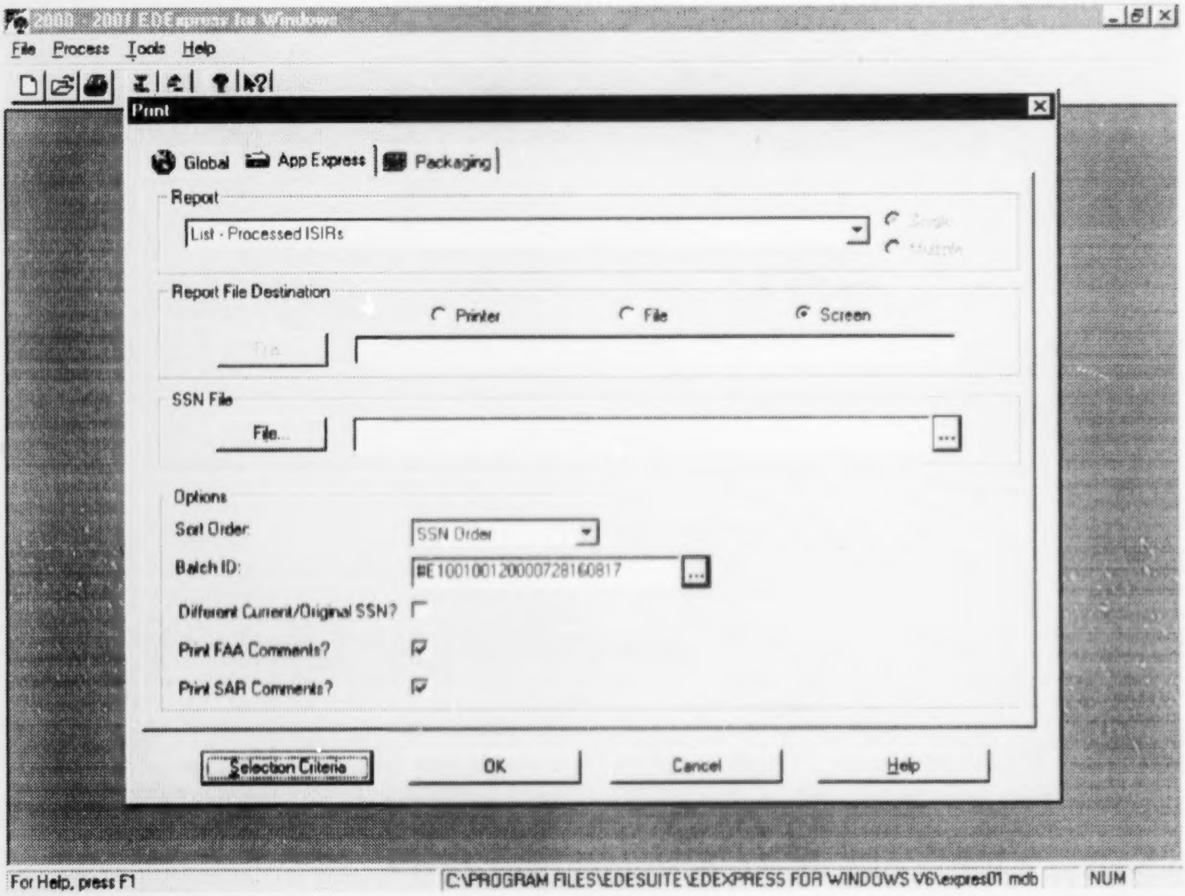
*Click **OK** to print the list to the selected destination.*

The Print screen is re-displayed.



2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Single
Multiple
File...
File...
Selection Criteria
OK
Cancel
Help

Report: List - Processed ISIRs

Report File Destination: ○ Printer ○ File ● Screen

SSN File:

Options

Sort Order: SSN Order

Batch ID: #E100100120000728160817

Different Current/Original SSN? ☐

Print FAA Comments? ☑

Print SAR Comments? ☑

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

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Transaction Type:

0 – From electronic initial application

1 – Automatic ISIR generated

2 – From electronic correction

3 – From electronic duplicate request

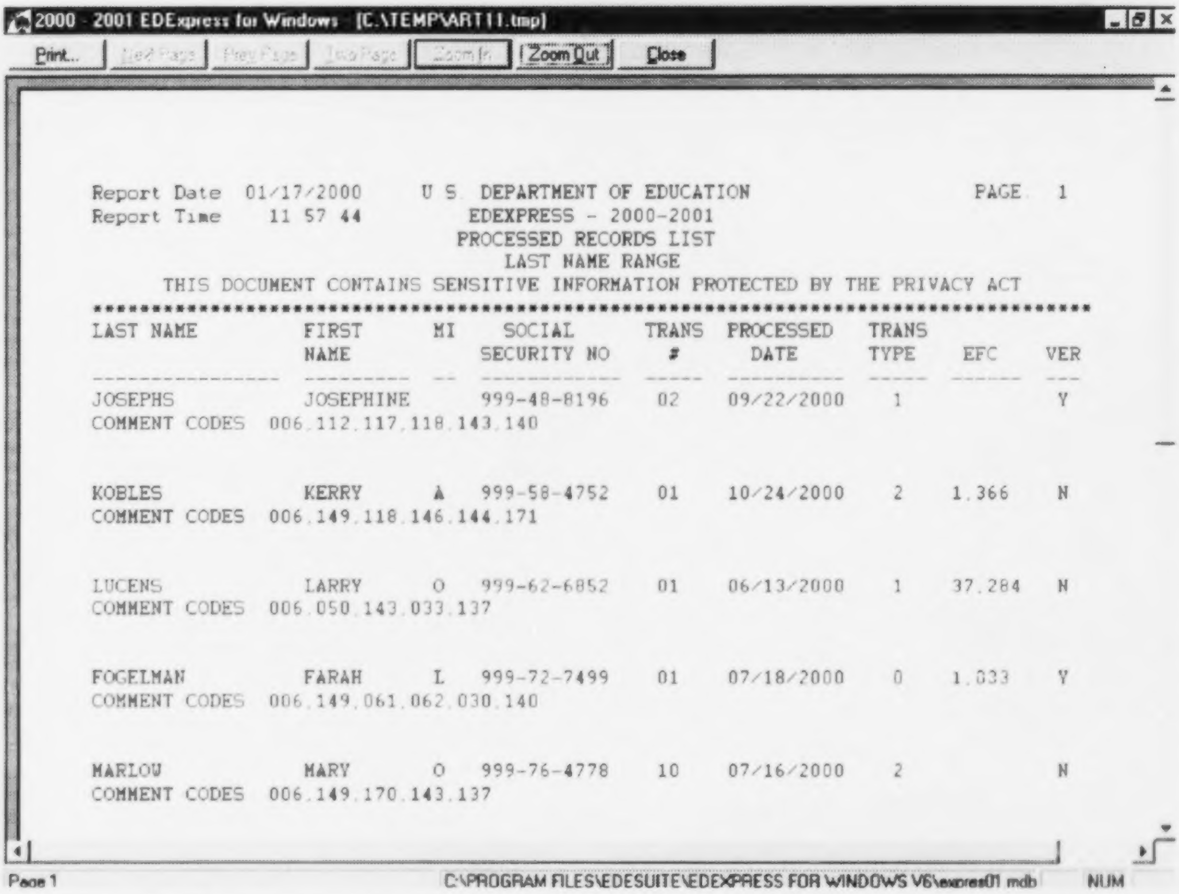
5 – From electronic renewal application

Tip: An ISIR with no EFC present is a rejected record.

Because you sent the list to the screen, you can view the Processed Records list, which has summary information about each record.

*Click the **Print** button at the top of the screen if you want to print out the report.*

*Click the **Close** button when you have finished viewing the report.*



2000 - 2001 EDExpress for Windows - [C:\TEMP\ART11.tmp]
Print...
Next Page
Prev Page
Info Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

```
Report Date  01/17/2000     U S. DEPARTMENT OF EDUCATION              PAGE  1
Report Time     11 57 44         EDEXPRESS - 2000-2001
                                PROCESSED RECORDS LIST
                                   LAST NAME RANGE
      THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
**************************************************************************************
LAST NAME          FIRST      MI    SOCIAL      TRANS  PROCESSED   TRANS
                   NAME            SECURITY NO    #      DATE      TYPE    EFC    VER
----------------   ---------  --   -----------  -----  ----------  -----  ------  ---
JOSEPHS            JOSEPHINE       999-48-8196   02    09/22/2000    1             Y
COMMENT CODES  006.112.117.118.143.140


KOBLES             KERRY      A    999-58-4752   01    10/24/2000    2    1.366    N
COMMENT CODES  006.149.118.146.144.171


LUCENS             LARRY      O    999-62-6852   01    06/13/2000    1    37.284   N
COMMENT CODES  006.050.143.033.137


FOGELMAN           FARAH      L    999-72-7499   01    07/18/2000    0    1.033    Y
COMMENT CODES  006.149.061.062.030.140


MARLOW             MARY       O    999-76-4778   10    07/16/2000    2             N
COMMENT CODES  006.149.170.143.137
```

Printing Multiple ISIRS

*Select **File/Print/App Express**.*

The ISIR report option is displayed in the Report field.

*For multiple ISIRs, click the **Multiple** button.*

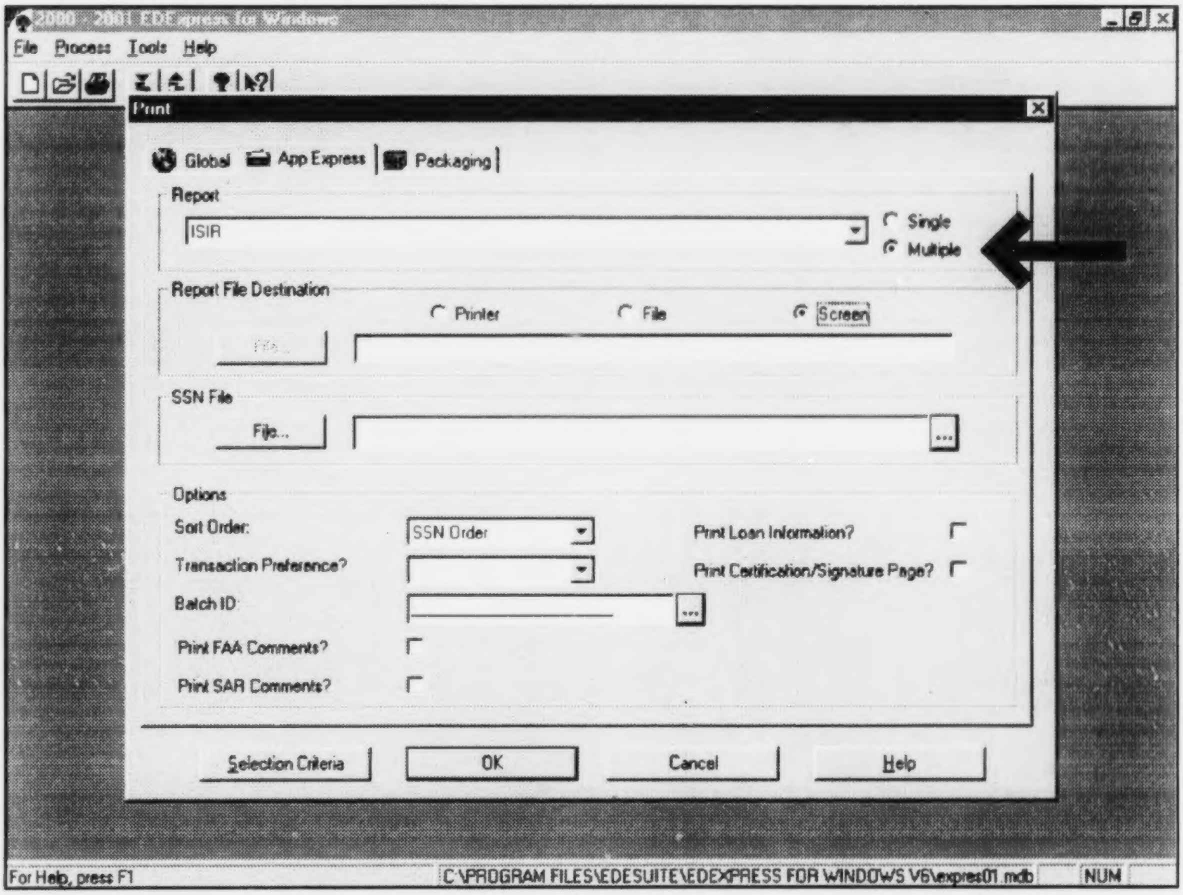
*Click **Screen** to view the ISIRs on your PC screen.*

*Click the **Selection Criteria** button to specify which query to use to view ISIRs.*

EDExpress provides a multiple option for all print reports, which allows printing of numerous records at one time. The multiple option provides several methods for identifying the group of records you want to print. In this example, selection criteria will identify the records to print.

To specify which records you want to print, you can use the standard Selection Criteria, a list of Social Security Numbers, a list of trankeys, or provide user-defined criteria that you created in Query.

The basic ISIR report is two pages long, but you can choose to include pages for FAA comments, SAR comments, loan information, and a signature page.



Report: ISIR
○ Single
● Multiple

Report File Destination
○ Printer
○ File
● Screen

SSN File:

Options
Sort Order: SSN Order
Transaction Preference?:
Batch ID:
Print FAA Comments? ☐
Print SAR Comments? ☐
Print Loan Information? ☐
Print Certification/Signature Page? ☐

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

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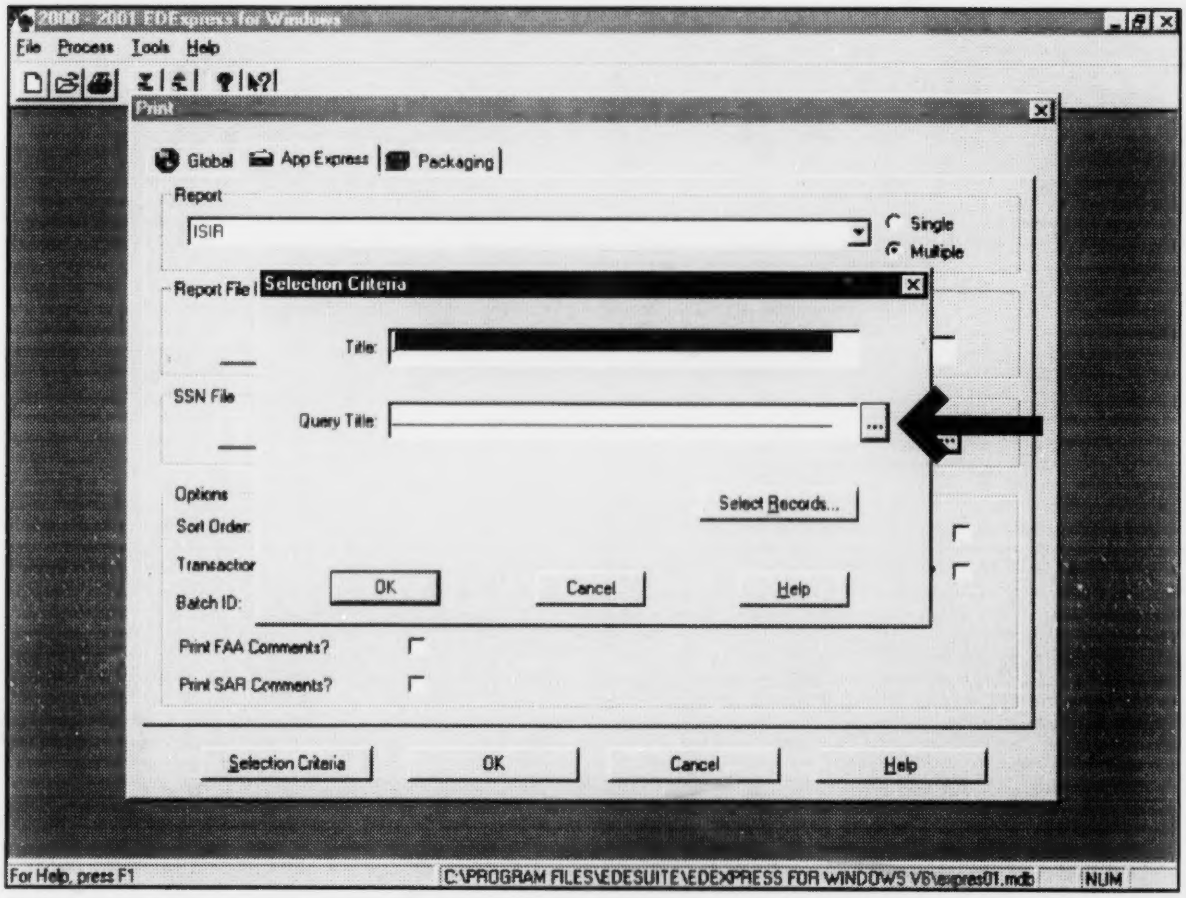
*Click the **ellipsis** button next to the **Query Title** field to see a list of queries.*



Report: ISIR
○ Single
● Multiple

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

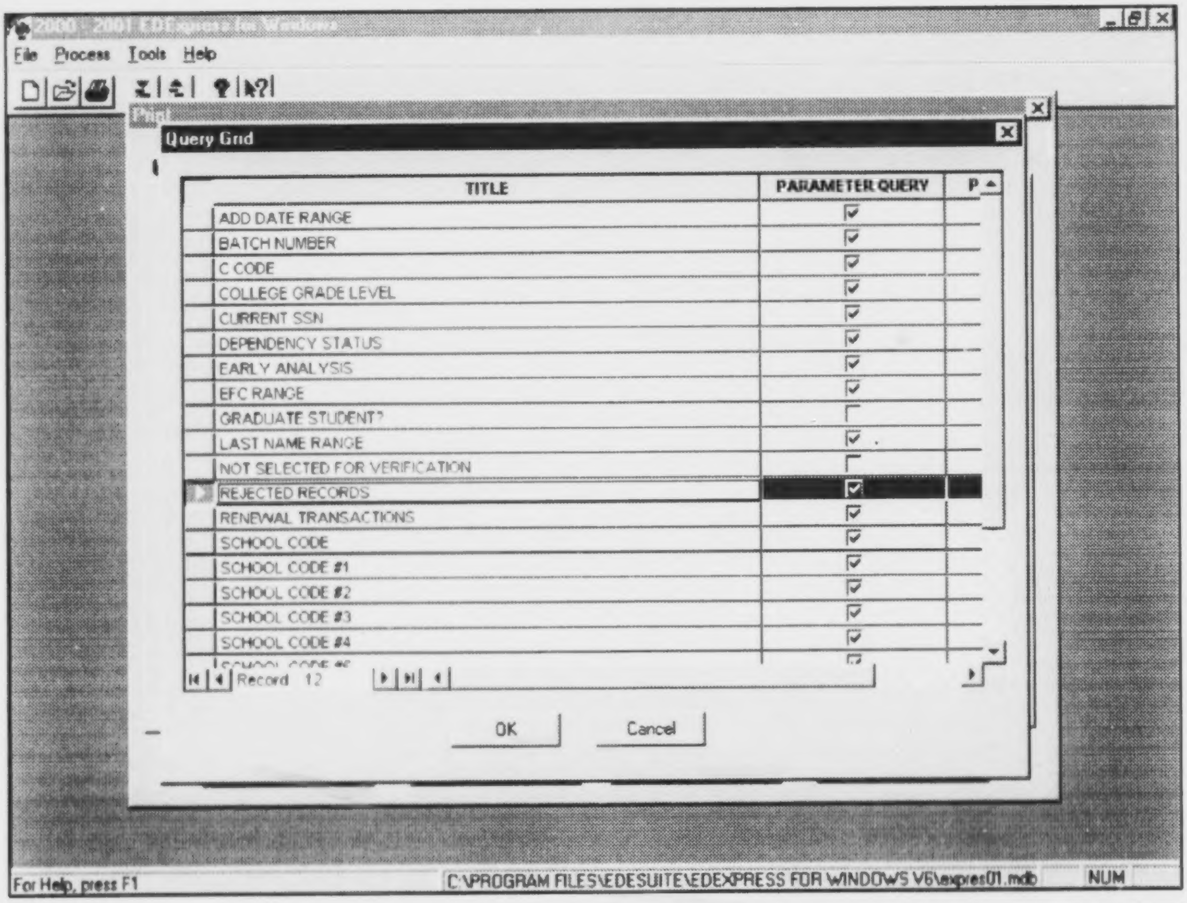
2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Report File I
SSN File
Options
Sort Order:
Transactior
Batch ID:
Print FAA Comments? ☐
Print SAR Comments? ☐
Selection Criteria
OK
Cancel
Help
Selection Criteria
Title:
Query Title:
...
Select Records...
OK
Cancel
Help
For Help, press F1
NUM

BEST COPY AVAILABLE

Click **OK**

In this example, we want to print ISIRs for all rejected records.

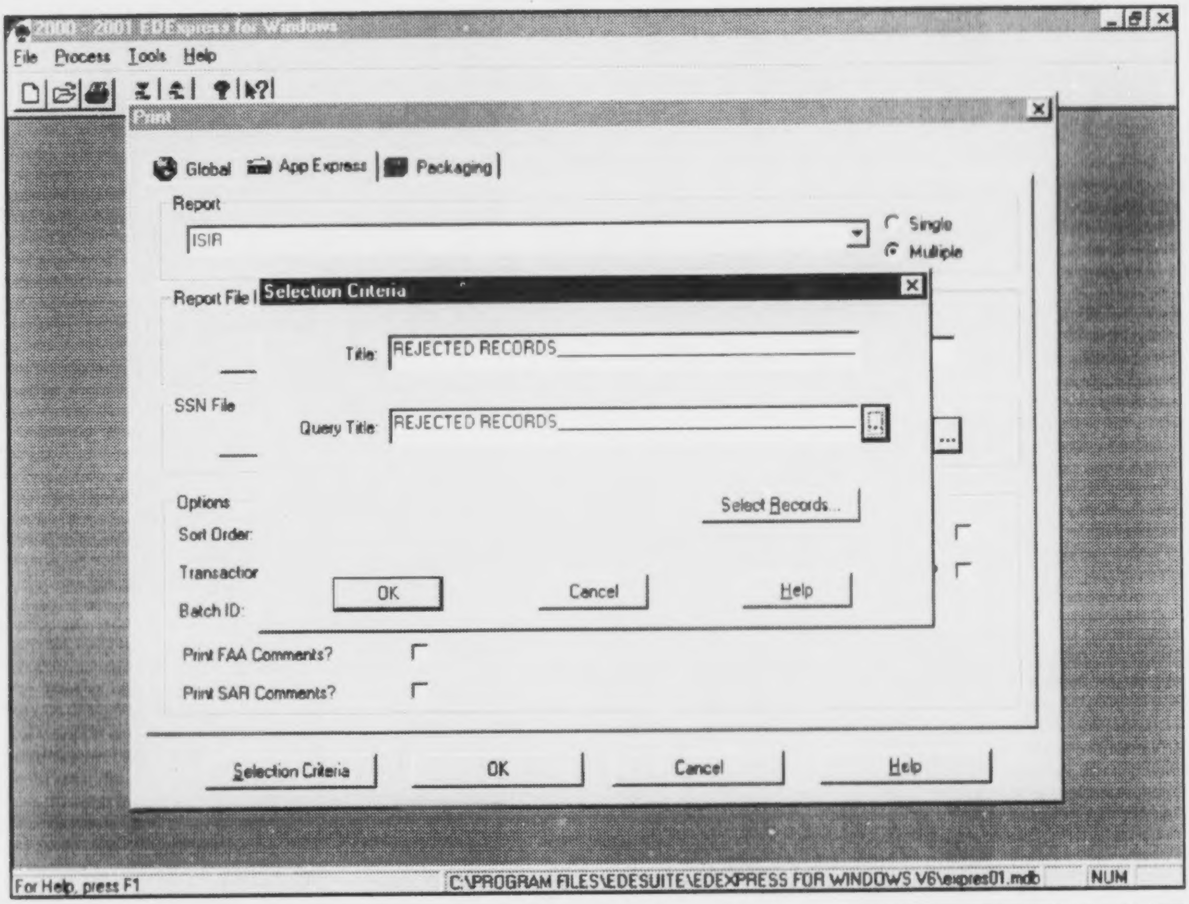
To select rejected records, select the Rejected Records field from the list.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Query Grid
Record 12
OK
Cancel
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

TITLE	PARAMETER QUERY	P
ADD DATE RANGE	☑	
BATCH NUMBER	☑	
C CODE	☑	
COLLEGE GRADE LEVEL	☑	
CURRENT SSN	☑	
DEPENDENCY STATUS	☑	
EARLY ANALYSIS	☑	
EFC RANGE	☑	
GRADUATE STUDENT?	☐	
LAST NAME RANGE	☑	
NOT SELECTED FOR VERIFICATION	☐	
REJECTED RECORDS	☑	
RENEWAL TRANSACTIONS	☑	
SCHOOL CODE	☑	
SCHOOL CODE #1	☑	
SCHOOL CODE #2	☑	
SCHOOL CODE #3	☑	
SCHOOL CODE #4	☑	

The Print screen is re-displayed

*Click **OK** to add the query as a selection criteria.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Selection Criteria
Select Records...
OK
Cancel
Help
Selection Criteria
OK
Cancel
Help
NUM

Report: ISIR
○ Single
● Multiple

Title: REJECTED RECORDS
Query Title: REJECTED RECORDS

Print FAA Comments? ☐
Print SAR Comments? ☐

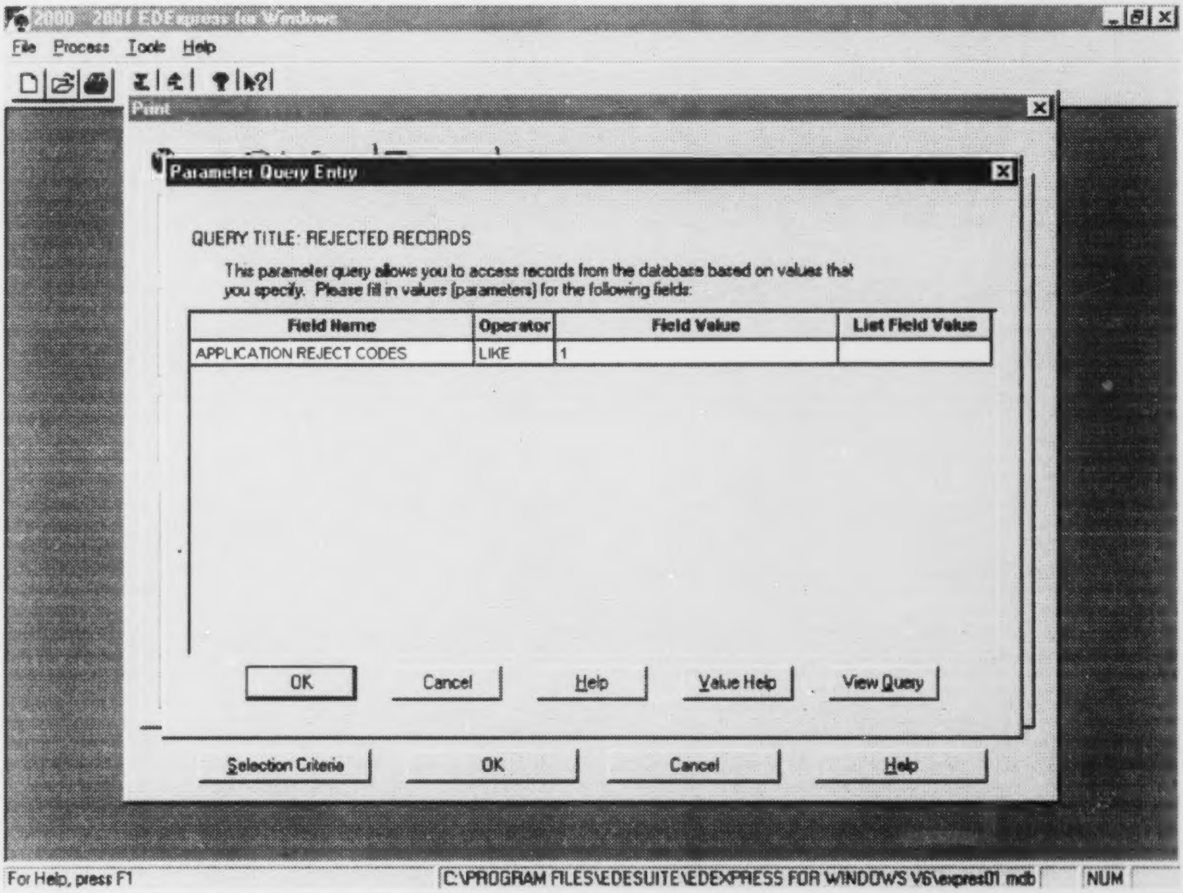
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

*Add the value **1** in the Field Value space to select all records that contain 1 as the reject code.*

*Click **OK***

The Parameter Query Entry screen is displayed.

Tip: To see valid values for the field, refer to the EDE Technical Reference.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Parameter Query Entry
OK
Cancel
Help
Value Help
View Query
Selection Criteria
OK
Cancel
Help

QUERY TITLE: REJECTED RECORDS

This parameter query allows you to access records from the database based on values that you specify. Please fill in values (parameters) for the following fields:

Field Name	Operator	Field Value	List Field Value
APPLICATION REJECT CODES	LIKE	1	

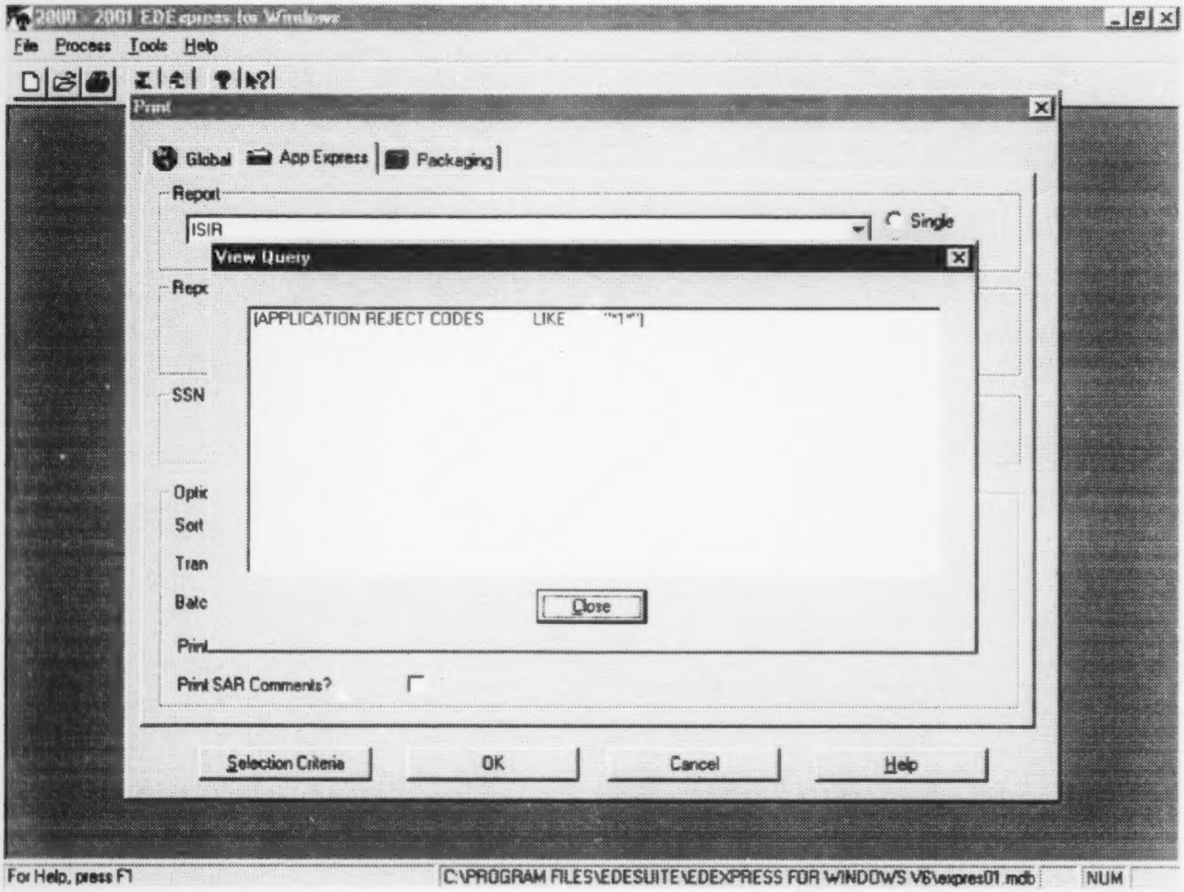
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

EDExpress displays the critera you selected for your query. We will select all rejected records that have a W as the reject code.

Click ***Close***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Report
Single
View Query
Repc
SSN
Optic
Sort
Tran
Batc
Prin
Close
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

ISIR

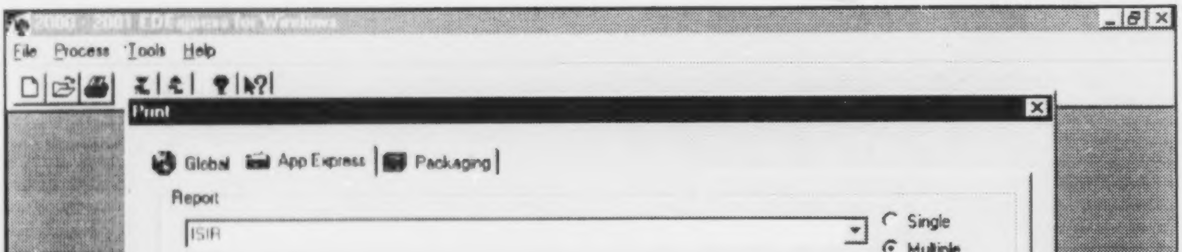
```
[APPLICATION REJECT CODES        LIKE        "*1*"]
```

Print SAR Comments? ☐

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

*Click **OK** to print the ISIRs for the selected group*

The Print screen is re-displayed.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
File...
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Report: ISIR
○ Single
● Multiple

Report File Destination
○ Printer
○ File
● Screen

SSN File

Options
Sort Order: SSN Order
Transaction Preference?
Batch ID:
Print FAA Comments? ☐
Print SAR Comments? ☐
Print Loan Information? ☐
Print Certification/Signature Page? ☐

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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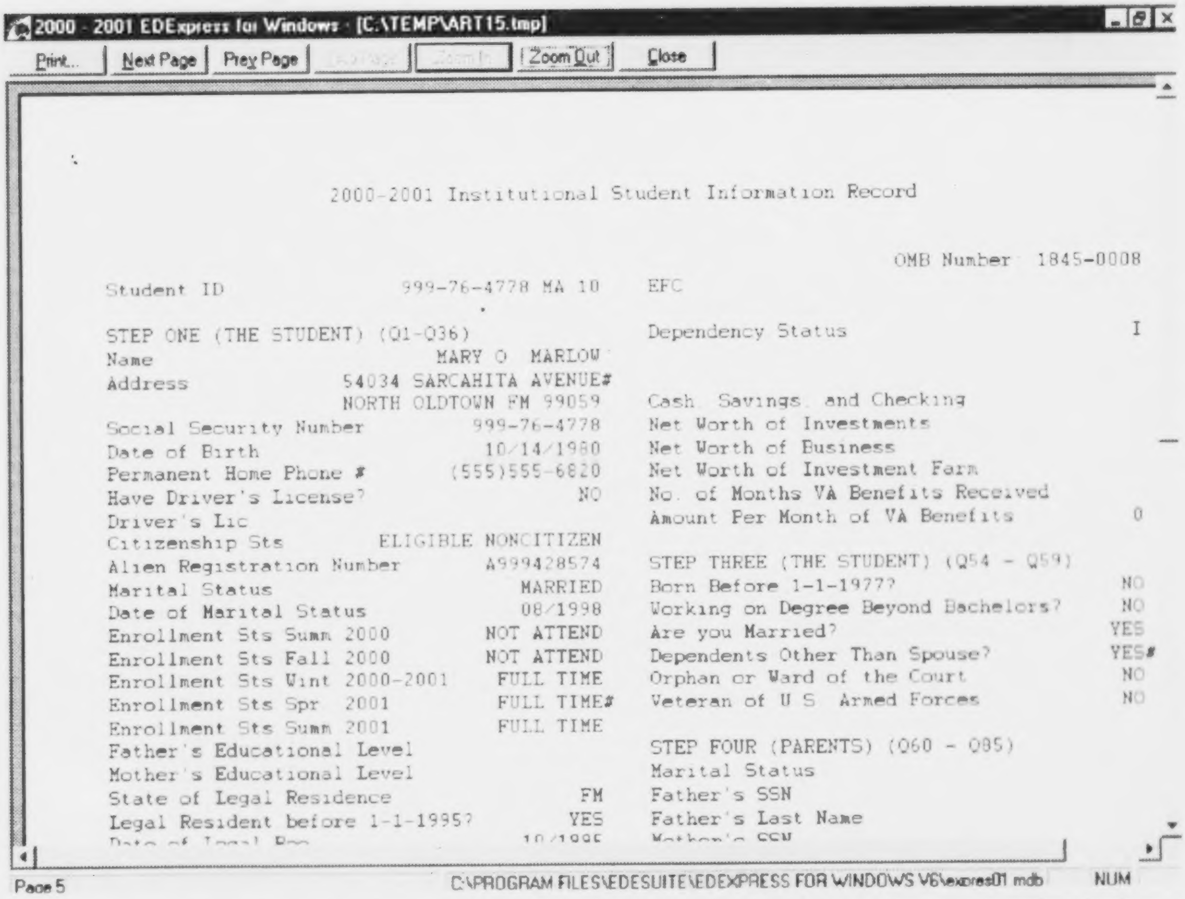
The ISIR's are displayed. All of the information on the ISIR is given on this report.

Tip: Use the Print to Screen option to preview the print output. Then use the Print button to get the hard copy.

*Click **Next Page** at the top of the screen to move from page to page.*

*When you have finished viewing the ISIRs, click the **Close** button.*


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART15.tmp]
Print...
Next Page
Prev Page
Zoom Out
Close
Page 5
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

```
                 2000-2001 Institutional Student Information Record

                                                          OMB Number  1845-0008
Student ID                 999-76-4778 MA 10    EFC

STEP ONE (THE STUDENT) (Q1-Q36)                 Dependency Status                 I
Name                            MARY O  MARLOW
Address                   54034 SARCAHITA AVENUE#
                          NORTH OLDTOWN FM 99059  Cash  Savings  and Checking
Social Security Number          999-76-4778     Net Worth of Investments
Date of Birth                    10/14/1980     Net Worth of Business
Permanent Home Phone #        (555)555-6820     Net Worth of Investment Farm
Have Driver's License?                   NO     No. of Months VA Benefits Received
Driver's Lic                                    Amount Per Month of VA Benefits   0
Citizenship Sts         ELIGIBLE NONCITIZEN
Alien Registration Number        A999428574     STEP THREE (THE STUDENT) (Q54 - Q59)
Marital Status                      MARRIED     Born Before 1-1-1977?            NO
Date of Marital Status              08/1998     Working on Degree Beyond Bachelors?  NO
Enrollment Sts Summ 2000         NOT ATTEND     Are you Married?                 YES
Enrollment Sts Fall 2000         NOT ATTEND     Dependents Other Than Spouse?    YES#
Enrollment Sts Wint 2000-2001     FULL TIME     Orphan or Ward of the Court      NO
Enrollment Sts Spr  2001          FULL TIME#    Veteran of U S  Armed Forces     NO
Enrollment Sts Summ 2001          FULL TIME
Father's Educational Level                      STEP FOUR (PARENTS) (Q60 - Q85)
Mother's Educational Level                      Marital Status
State of Legal Residence                 FM     Father's SSN
Legal Resident before 1-1-1995?         YES     Father's Last Name
```

128 BEST COPY AVAILABLE

Lesson 1 Query Exercise

In the preceding pages, a pre-defined query was used to identify certain rejected records on your database. The query is constructed for you to identify only specific reject codes, but what if you just wanted to print a list of all rejected records? What would that query look like?

Your Challenge

Discuss with your team members different methods of creating a query that identifies all rejected records. You may also want to limit the query to records in a specific ISIR batch or other limiting factor such as name range or add date.

Use the worksheet on the following page to write out your query. Then, set it up in EDExpress and print a list of processed ISIRs to see if it works to your satisfaction.

Query Worksheet

In the space below, describe the group of students to be selected

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Setting Up Document Tracking

EDExpress for Windows can record your request for and receipt of documents such as tax returns or institutional aid applications from a student. The Document Tracking dialog box sets up the defaults for your document tracking records.

Documents will be added to student records in two ways: manual entry and/or using the Add Documents process. For any student record, you can manually add any document you determine is needed for that student. However, if you want some or all of your documents added to records automatically, you can use the Process/Add Documents feature described in the next section of this lesson.

Step 1

For each document you create, you will:

- Assign a code with which to track the document.
- Provide a year indicator if needed (this can also be left blank).
- Type a description that will print on the document tracking letter.

Step 2

To select specific students from whom you want to automatically request a document, select:

- Criteria – Queries you create using the Query setup.
- Comment Code(s) – The document will be applied to a record that has any of the ISIR comment codes you specify.

Step 3

To use the Add Documents process to add documents automatically to student records, you must check either:

- Automatic Request – If checked with no other criteria specified, this document will be added to all records (defined in step 2.)
- Require for Verification – If checked, this will apply to any student selected for verification by the CPS.

Step 4

Decide if this document will be required before the student's records can be packaged using the Packaging function in EDExpress. If the document is not marked as received, the software will not package the student.

SAMPLE

Defining Documents Worksheet

1. Code: This code will display on reports and on the Document Tracking tab of the Student's Record. (10-digit alphanumeric.)

Code: INST APP

2. **Year**: Enter the year(s), if applicable, for the document being requested. This will print on reports and on the Document Tracking section of the Student's Record. (9-digit alphanumeric.)

Year: 2000

3. **Description**: Enter a freeform description of the document. The description will print on the Document Tracking letter as the item being requested. (48-digit alphanumeric.)

Description: *Institutional Application for Aid*

4. **Criteria**: Enter Applicable User Defined Query. The Query will identify those records requiring a particular document.

Criteria: *Graduate Students*

5. **Automatic Request**: Do you wish this document to be automatically requested when the Add Documents function is performed?

Automatic Request? Yes ☒ No ☐

6. **Required for Packaging?** Is this document required before your office will package these financial aid applicants?

Required for Packaging? Yes ☐ No ☒

7. **Required for Verification?** Is this document being requested from only those students who have been selected for verification by the CPS?

Required for Verification? Yes ☐ No ☒

8. Comments: This document will be requested of those applicants whose ISIR record contains one of the following comment codes:

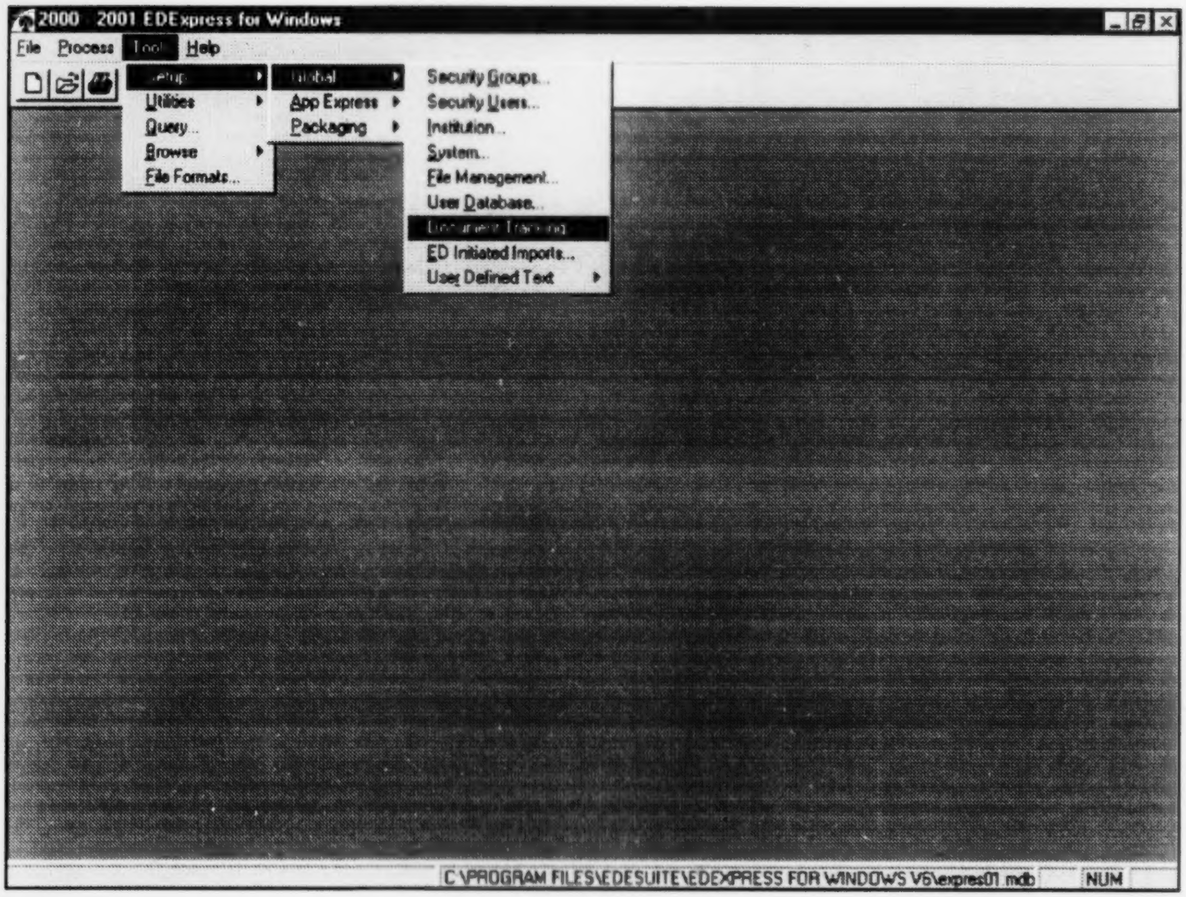
☐ ☐ ☐ ☐ ☐ ☐

Creating a Document

To create new document records:

*Select **Tools** from the menu bar.*

*Click **Setup/Global/ Document Tracking**.*

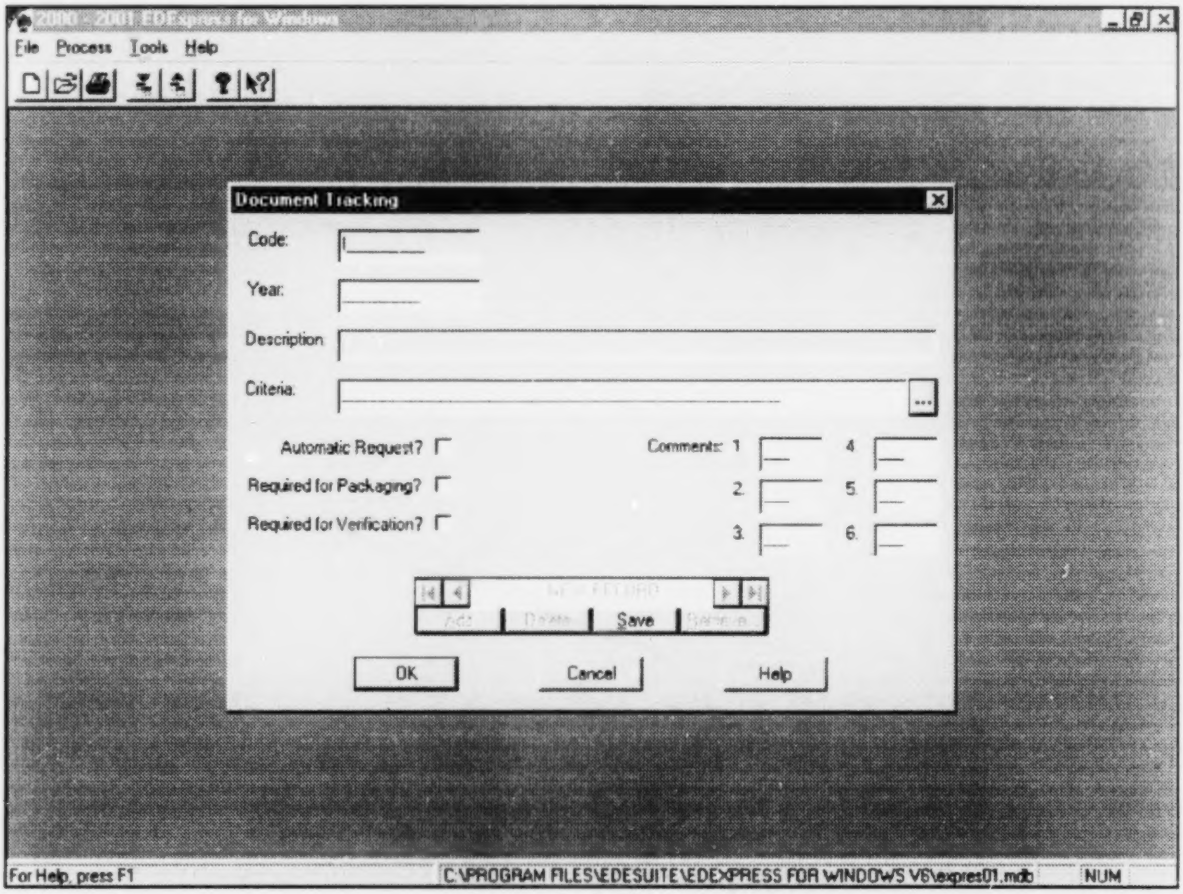

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Security Groups...
Security Users...
Institution...
System...
File Management...
User Database...
Document Tracking
ED Initiated Imports...
User Defined Text
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

The Document Tracking dialog box displays.

The first time you set up Document Tracking, the fields will be blank.

Note. Required entry fields are yellow.

If you already have documents set up, then you click ***Add*** *to create new documents.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Document Tracking
Code:
Year:
Description
Criteria:
Automatic Request? ☐
Required for Packaging? ☐
Required for Verification? ☐
Comments: 1
2
3
4
5
6
New RECORD
Add
Delete
Save
Remove
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

*Type the document code **INST APP** in the Code field.*

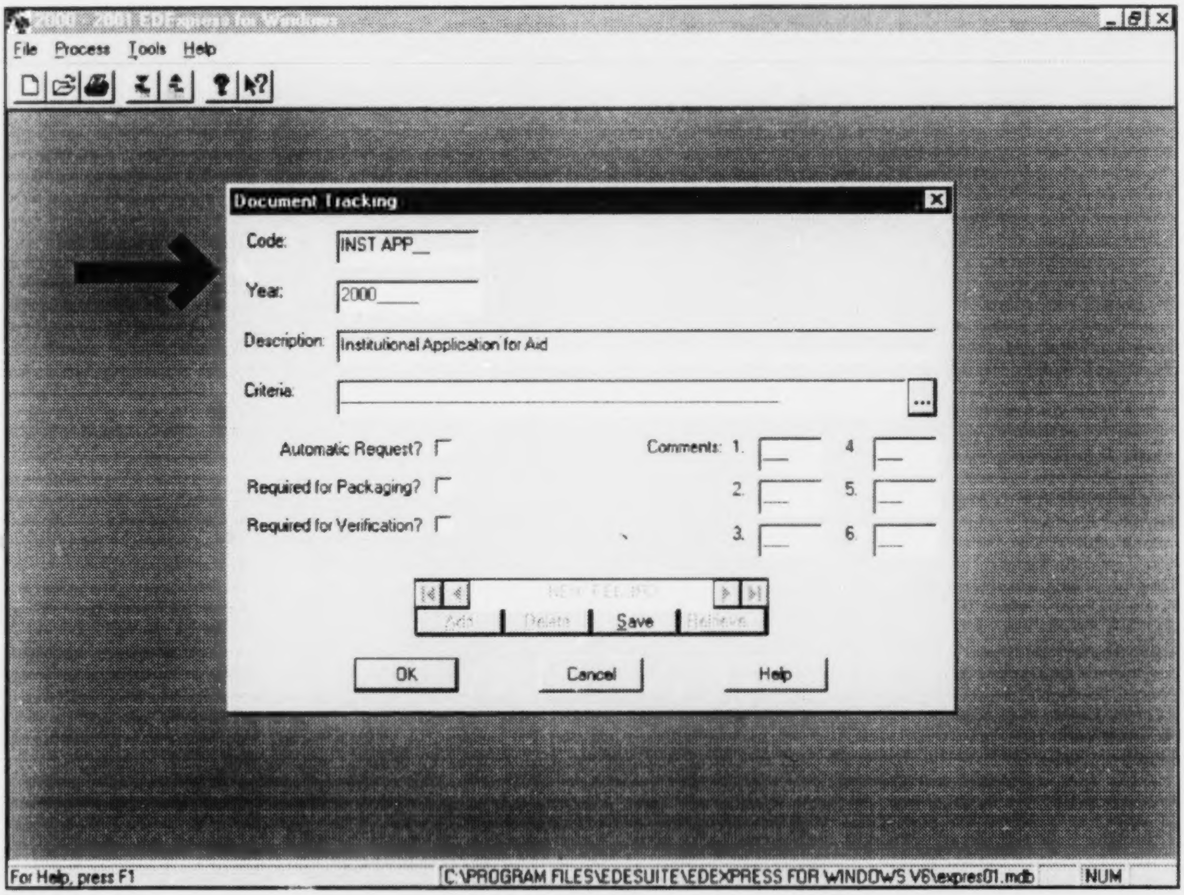
Next type the year(s) (example: 2000) to which this document applies in the Year field.

Type the full description for the document you will request.

A unique code of up to 10 characters is used to identify this document profile. This code will be displayed in the document tracking portion of the student's record, but will not print on the document tracking letter.

The year will print with the document description on the document tracking letter, which eliminates keying the year in each document description.

The document description should be detailed enough that a student understands what you are requesting.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Document Tracking
Criteria:
Automatic Request? ☐
Required for Packaging? ☐
Required for Verification? ☐
Comments: 1. 2. 3. 4. 5. 6.
NEW RECORD
Add
Delete
Save
Retrieve
OK
Cancel
Help
For Help, press F1
NUM

Code: INST APP

Year: 2000

Description: Institutional Application for Aid

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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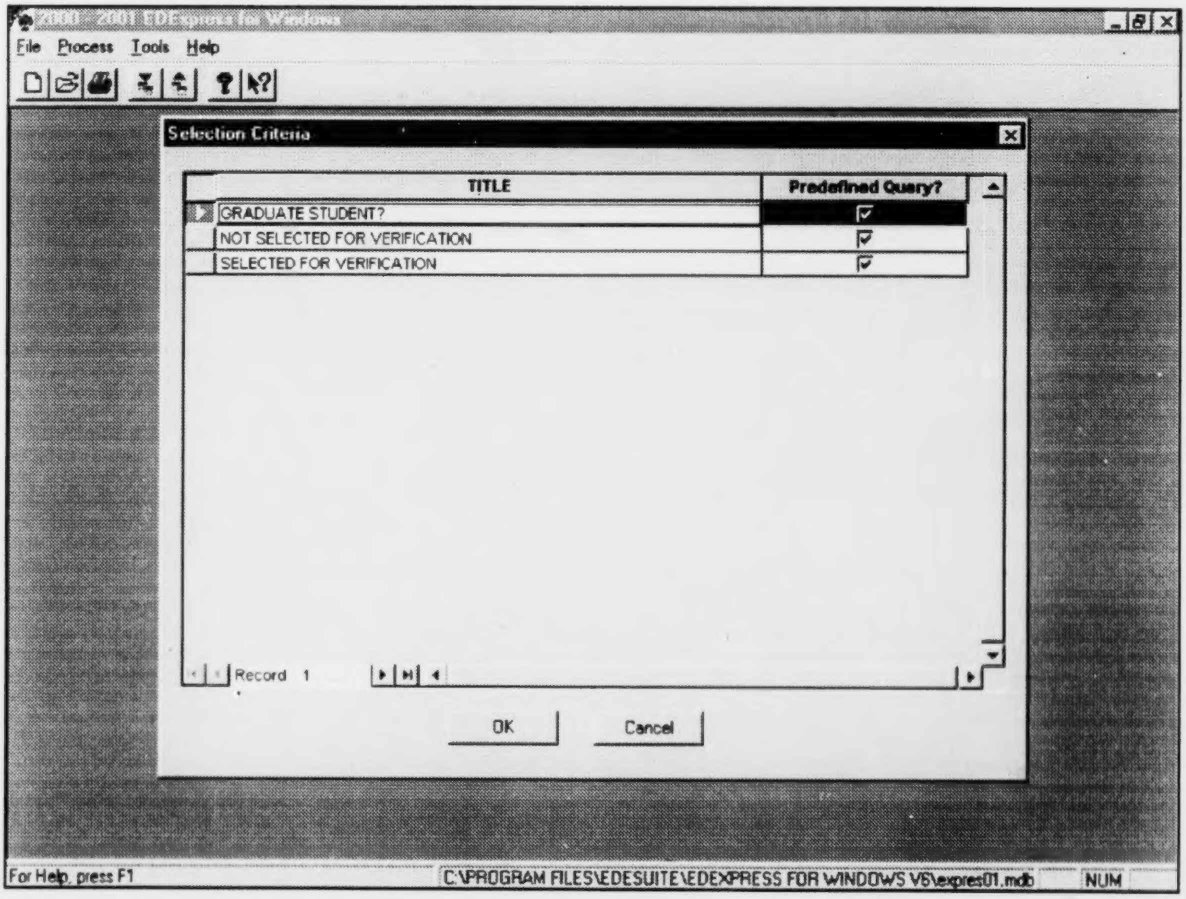
Criteria may be left blank. However, if you want to request this document from a certain group of students, use a query.

Type the query name that was set up in the query database or click the ellipsis button to see the query database.

Double-click on the query you wish to select or highlight the row and click ***OK****.*



2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Selection Criteria
Record 1
OK
Cancel
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

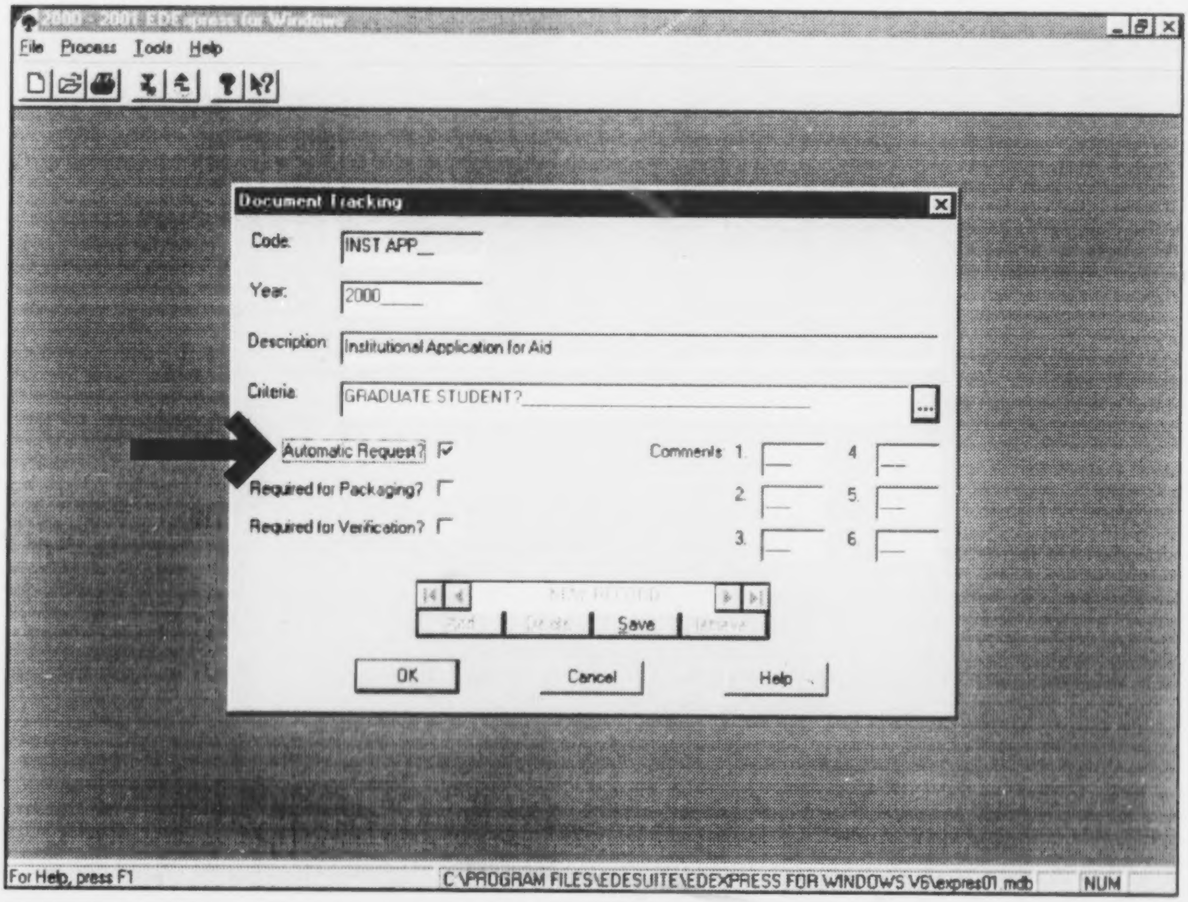
TITLE	Predefined Query?
GRADUATE STUDENT?	☑
NOT SELECTED FOR VERIFICATION	☑
SELECTED FOR VERIFICATION	☑

Click on the ***Automatic Request*** *field*

The title of the query you select is displayed in the Criteria box.

Finally, determine if you will:

1. Request this document from all students.
2. Require this document to be received before the record can be packaged.
3. Require this document if the student has been selected for verification.
4. Request a document based on a comment code that appears on the ISIR.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Document Tracking
Comments
NEW RECORD
Add
Delete
Save
Refresh
OK
Cancel
Help
For Help, press F1
NUM

Code: INST APP

Year: 2000

Description: Institutional Application for Aid

Criteria: GRADUATE STUDENT?

Automatic Request? ☑

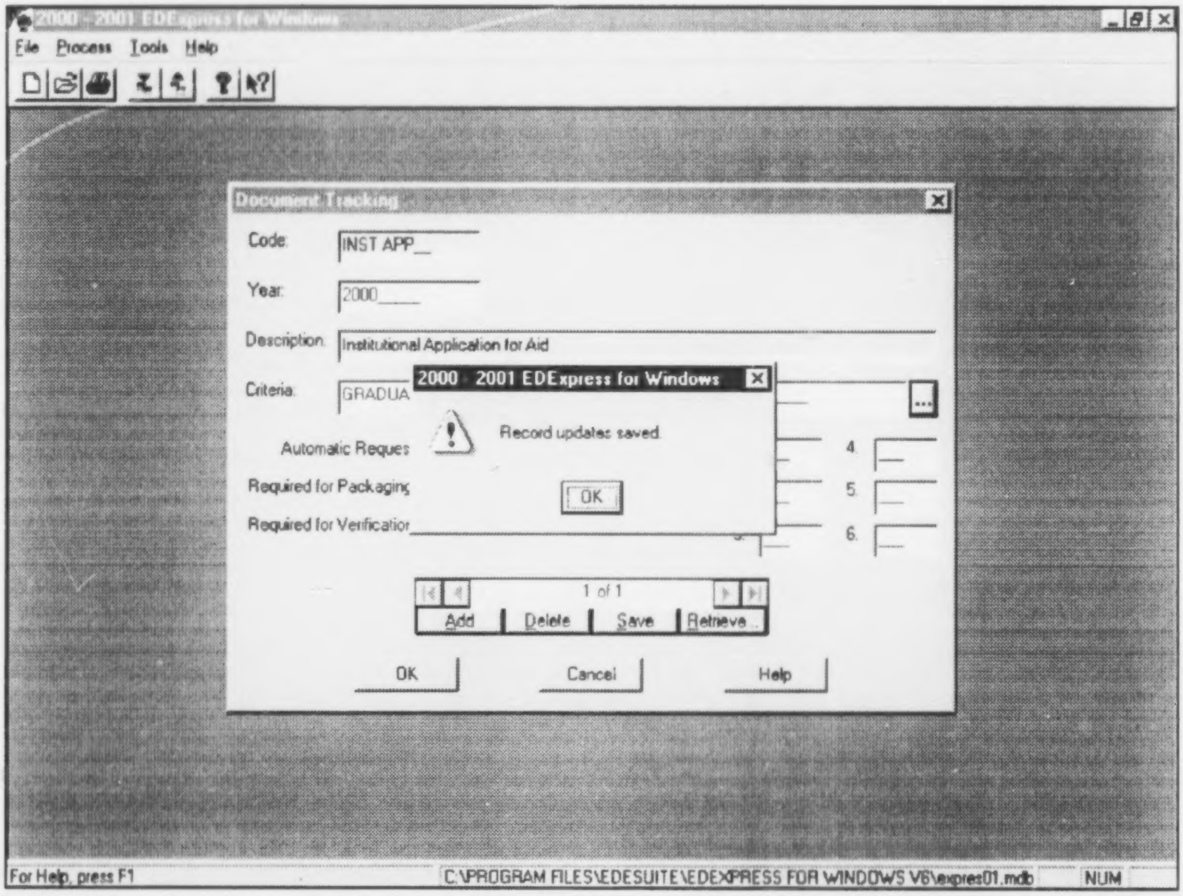
Required for Packaging? ☐

Required for Verification? ☐

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Tip: If you enter a document tracking record and then decide to cancel your entry and start over, click Cancel to close the Document Tracking dialog box. Select Document Tracking from the Setup menu again, click Add, and enter the new record.

*Click Save to add the document. Click **OK** to continue.*



Code: INST APP__
Year: 2000____
Description: Institutional Application for Aid
Criteria: GRADUA

2000 - 2001 EDExpress for Windows
Record updates saved.

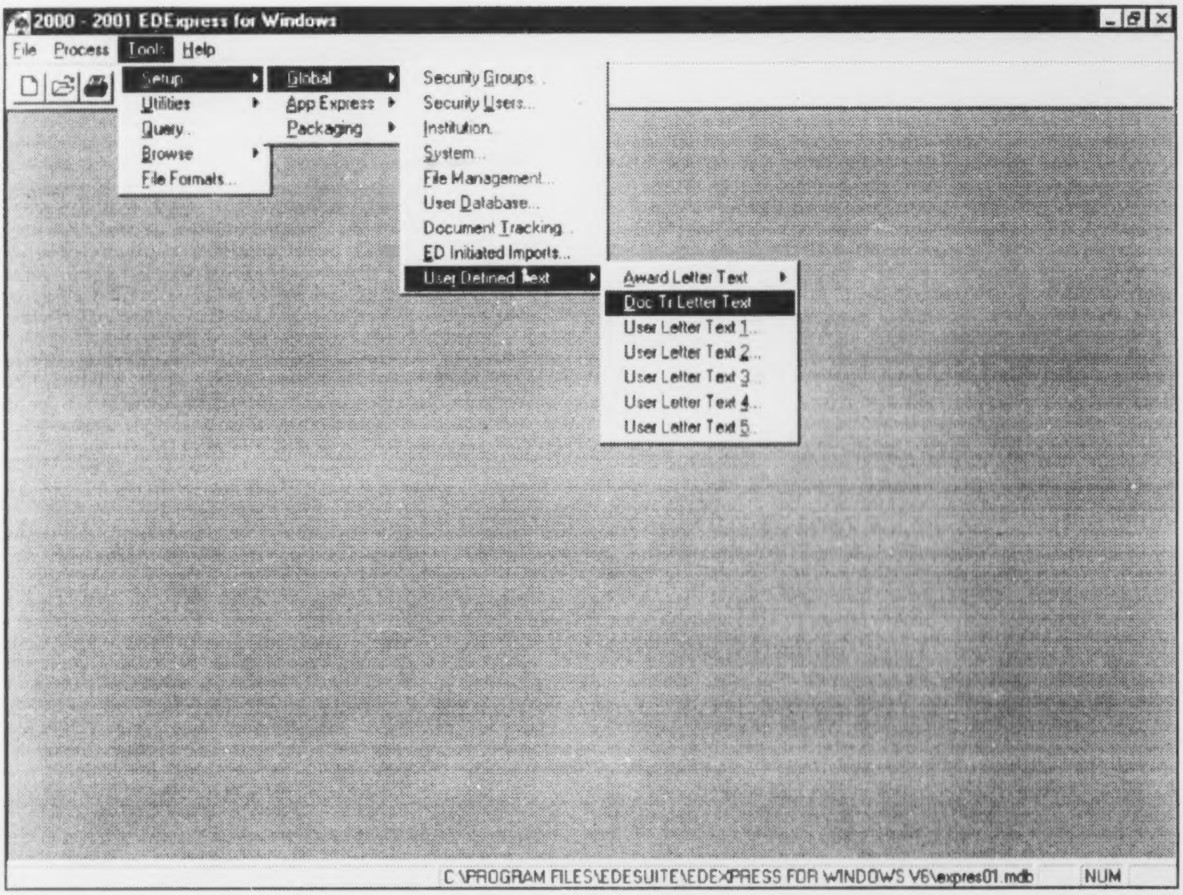
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Document Tracking
Automatic Reques
Required for Packaging
Required for Verification
4.
5.
6.
OK
1 of 1
Add
Delete
Save
Retrieve...
OK
Cancel
Help
For Help, press F1
NUM

Document Tracking Letter Text

To create document tracking letter text, select ***Tools/Setup/Global/User Defined Text/Doc Tr Letter Text.***

If you wish to request missing documents from the student, you will need to define the text that will appear on the document tracking letter. You may change or update the text at any time.

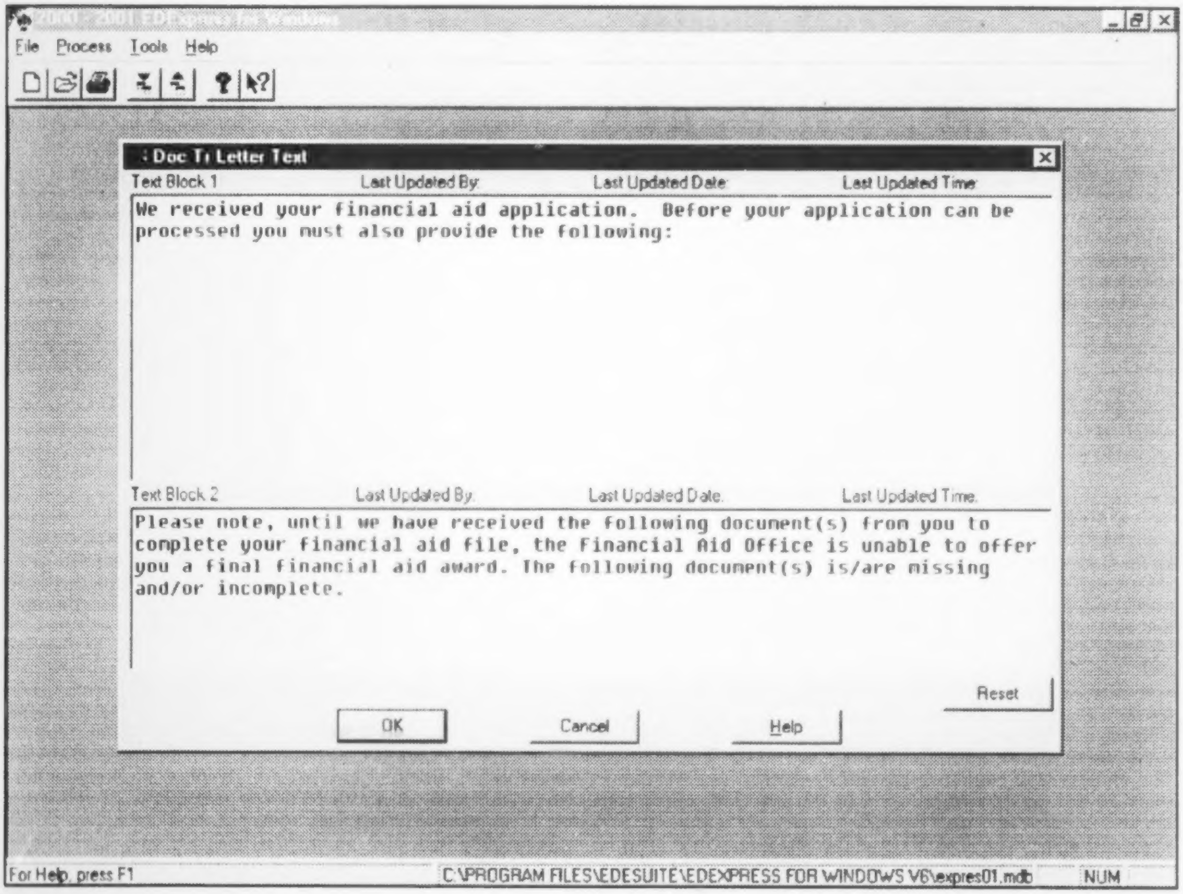

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Security Groups...
Security Users...
Institution...
System...
File Management...
User Database...
Document Tracking...
ED Initiated Imports...
User Defined Text
Award Letter Text
Doc Tr Letter Text
User Letter Text 1...
User Letter Text 2...
User Letter Text 3...
User Letter Text 4...
User Letter Text 5...
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

The entry box is blank. Begin typing your letter. You can enter up to 12 lines of text.

*Click **OK** to save your letter*

Click on the Help button for more information about creating letters. Provided in the screen print below is a sample of entered text.

NEW! **Now you can modify the predefined text in the second paragraph of the document tracking letter. Your user ID and the date you updated the text appears on the text entry screen. You can reset the text to the original default text at any time.**


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Doc Tr Letter Text
Text Block 1
Last Updated By:
Last Updated Date:
Last Updated Time:

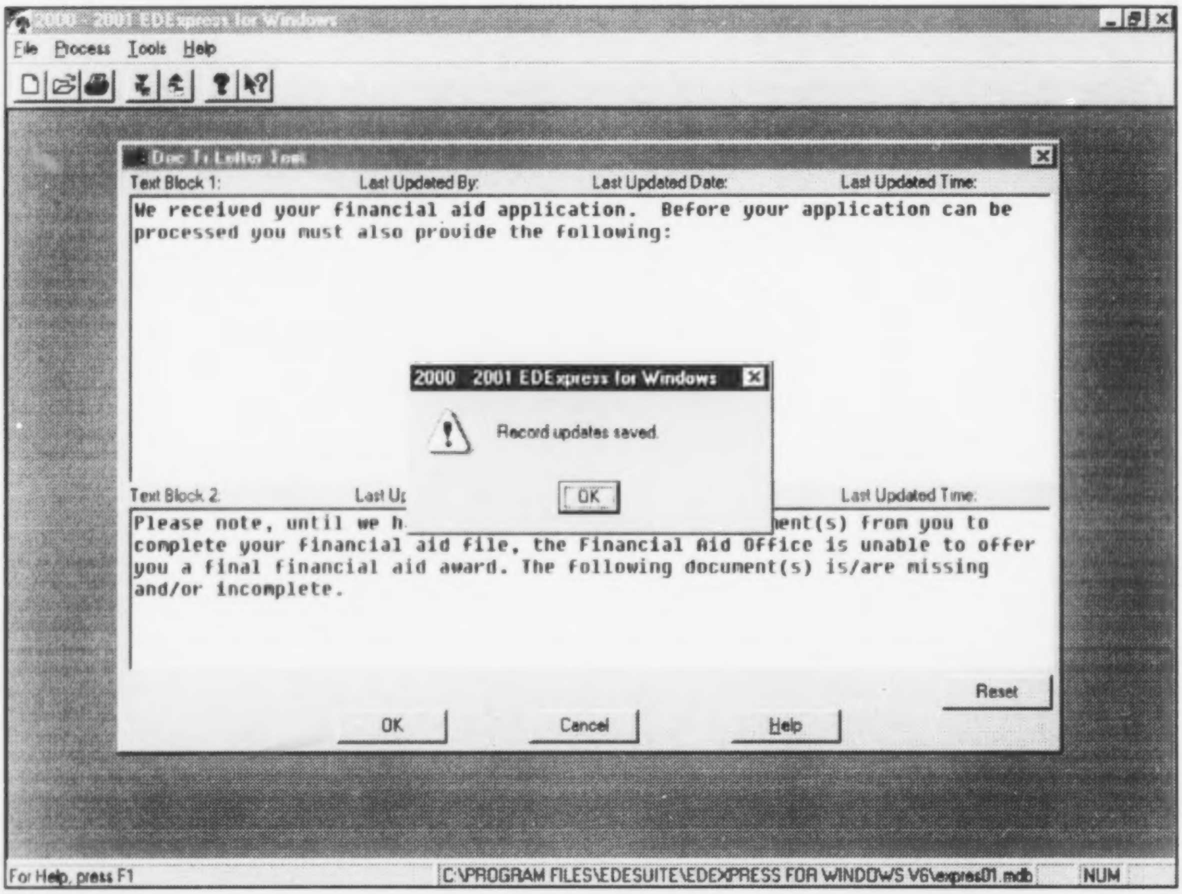
We received your financial aid application. Before your application can be processed you must also provide the following:

Text Block 2
Last Updated By:
Last Updated Date:
Last Updated Time:

Please note, until we have received the following document(s) from you to complete your financial aid file, the Financial Aid Office is unable to offer you a final financial aid award. The following document(s) is/are missing and/or incomplete.

Reset
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

The printed letter includes your text and the document description for each document requested.



2000 - 2001 EDExpress for Windows
File Process Tools Help
Doc Tr Letter Text
Text Block 1:
Last Updated By:
Last Updated Date:
Last Updated Time:

```
We received your financial aid application.  Before your application can be
processed you must also provide the following:
```

2000 2001 EDExpress for Windows

Record updates saved.

OK
Text Block 2:
Last Up
Last Updated Time:

```
Please note, until we h
ent(s) from you to
complete your financial aid file, the Financial Aid Office is unable to offer
you a final financial aid award. The following document(s) is/are missing
and/or incomplete.
```

Reset
OK
Cancel
Help
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

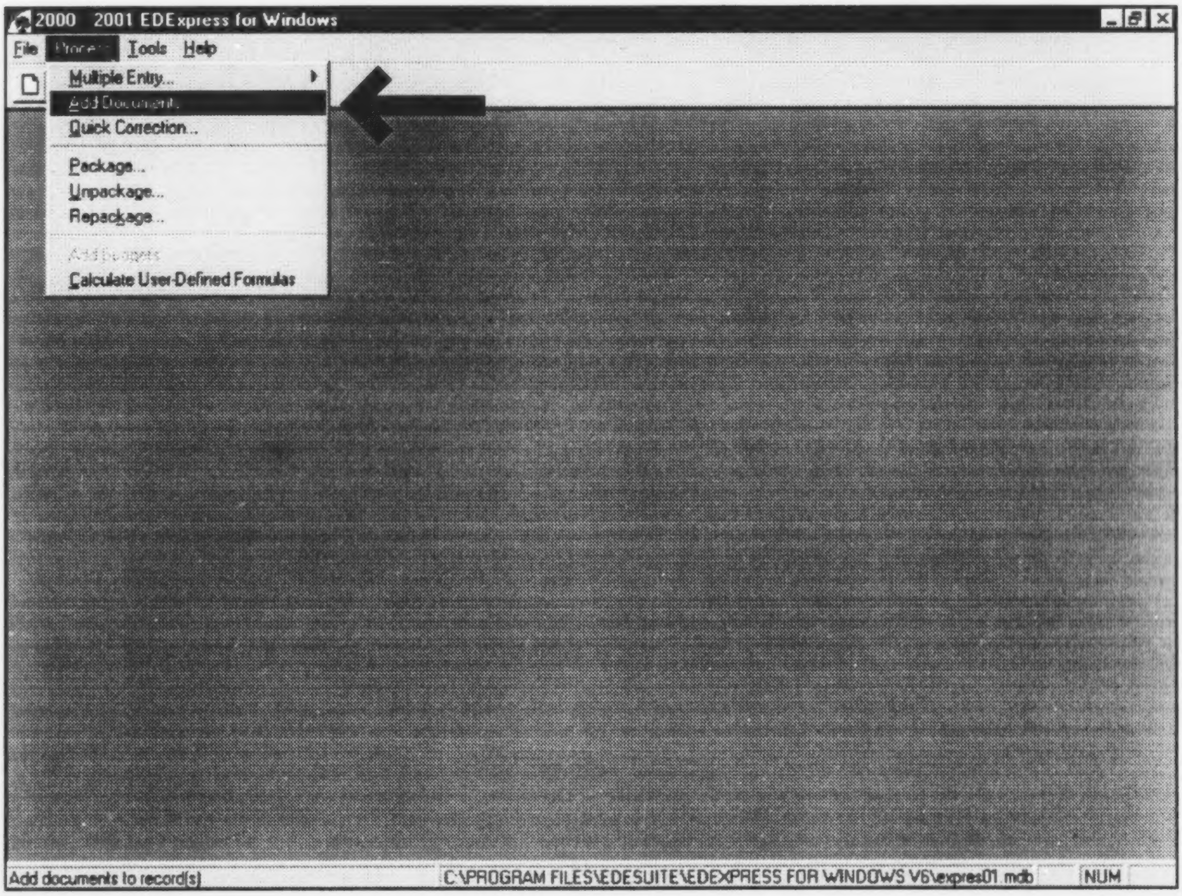
Adding Documents to Student Records

You can add documents to student records in three ways:

- Add Document option on the Process menu, which assigns documents to each student in your database according to the criteria that you specified for each document when you set up document tracking.
- Manual entry by using the Docs tab in the student's record.
- Multiple entry by using the Process/Multiple Entry/Global function.

In this example we will demonstrate the Add Documents function.

Select ***Process/Add Documents*** *from the menu bar.*

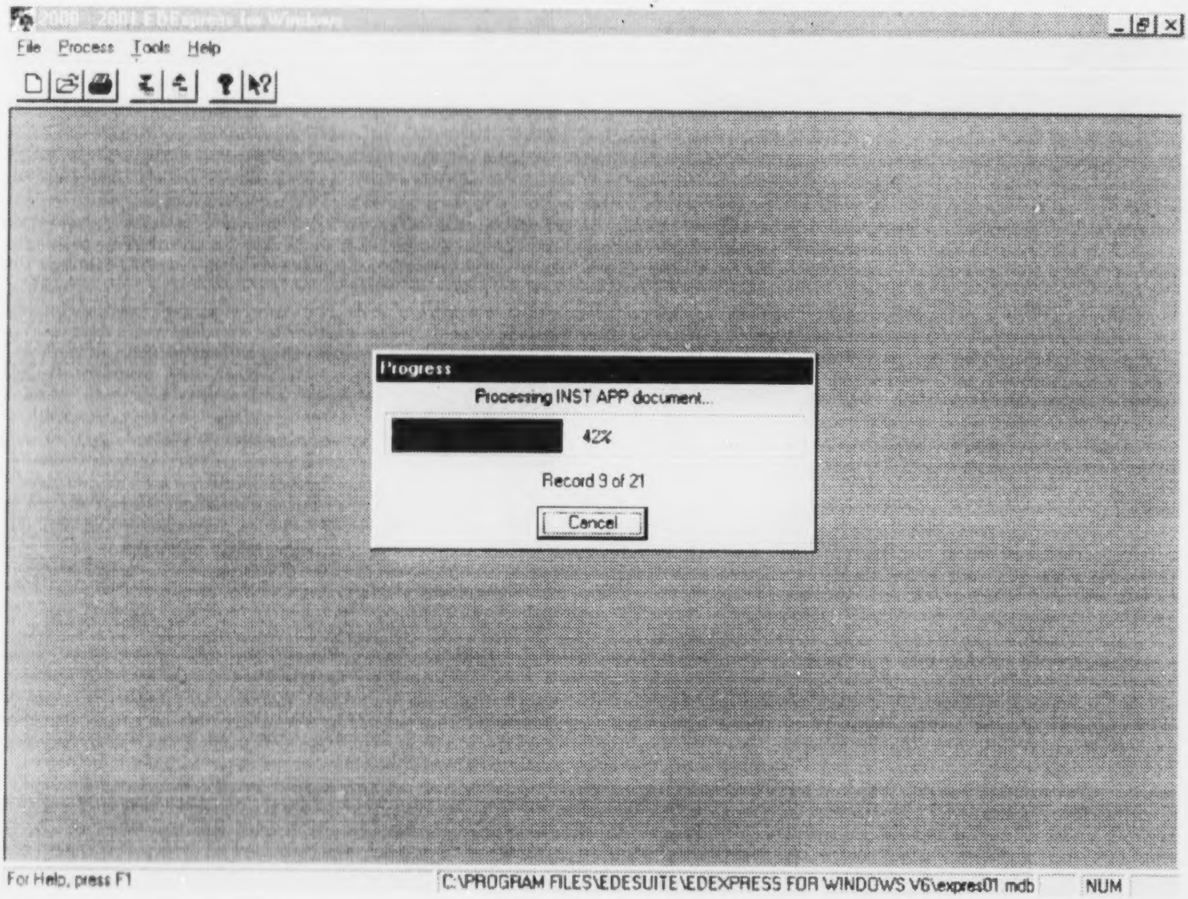


2000 2001 EDExpress for Windows
File
Process
Tools
Help
Multiple Entry...
Add Documents...
Quick Correction...
Package...
Unpackage...
Repackage...
Add Budgets
Calculate User-Defined Formulas
NUM

Add documents to record[s]

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

A progress bar appears for each document that is being added to student records


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Progress
Cancel
NUM

Processing INST APP document...

42%

Record 9 of 21

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

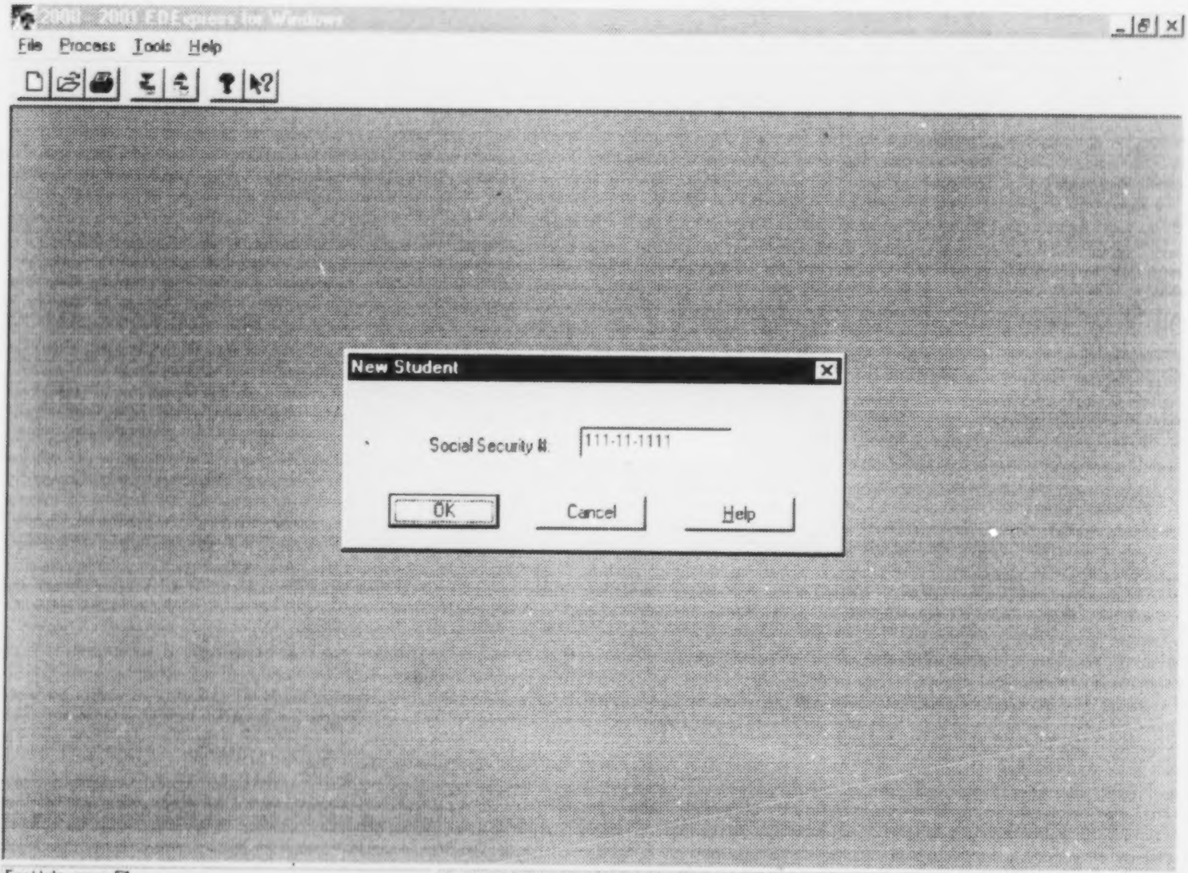
Reviewing Updates

To see the results of the Add Documents function, open a student's record.

*Click **File/Open***

Type the student's SSN

*Click **OK***



2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
New Student
OK
Cancel
Help
For Help, press F1
NUM

Social Security #: 111-11-1111

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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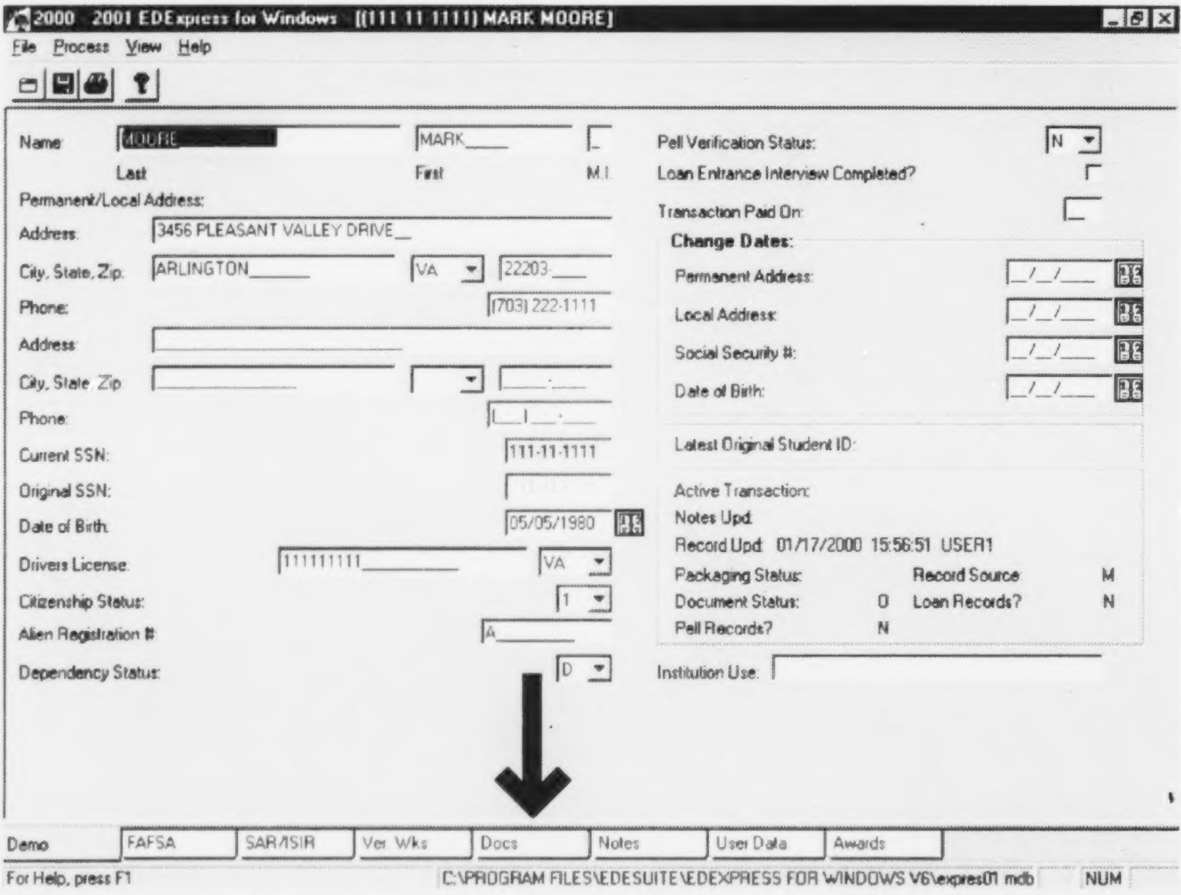
Click on the Docs tab at the bottom of the screen to see the Document Tracking screen for this student.



2000 2001 EDExpress for Windows [(111 11 1111) MARK MOORE]

Name: MOORE (Last) MARK (First) M.I.

Permanent/Local Address:
Address: 3456 PLEASANT VALLEY DRIVE
City, State, Zip: ARLINGTON VA 22203-
Phone: (703) 222-1111
Address:
City, State, Zip:
Phone:
Current SSN: 111-11-1111
Original SSN:
Date of Birth: 05/05/1980
Drivers License: 111111111 VA
Citizenship Status: 1
Alien Registration #: A
Dependency Status: D

Pell Verification Status: N
Loan Entrance Interview Completed? ☐
Transaction Paid On:

Change Dates:
Permanent Address: _/_/__
Local Address: _/_/__
Social Security #: _/_/__
Date of Birth: _/_/__

Latest Original Student ID:

Active Transaction:
Notes Upd:
Record Upd: 01/17/2000 15:56:51 USER1
Packaging Status: Record Source: M
Document Status: 0 Loan Records? N
Pell Records? N

Institution Use:

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01 mdb

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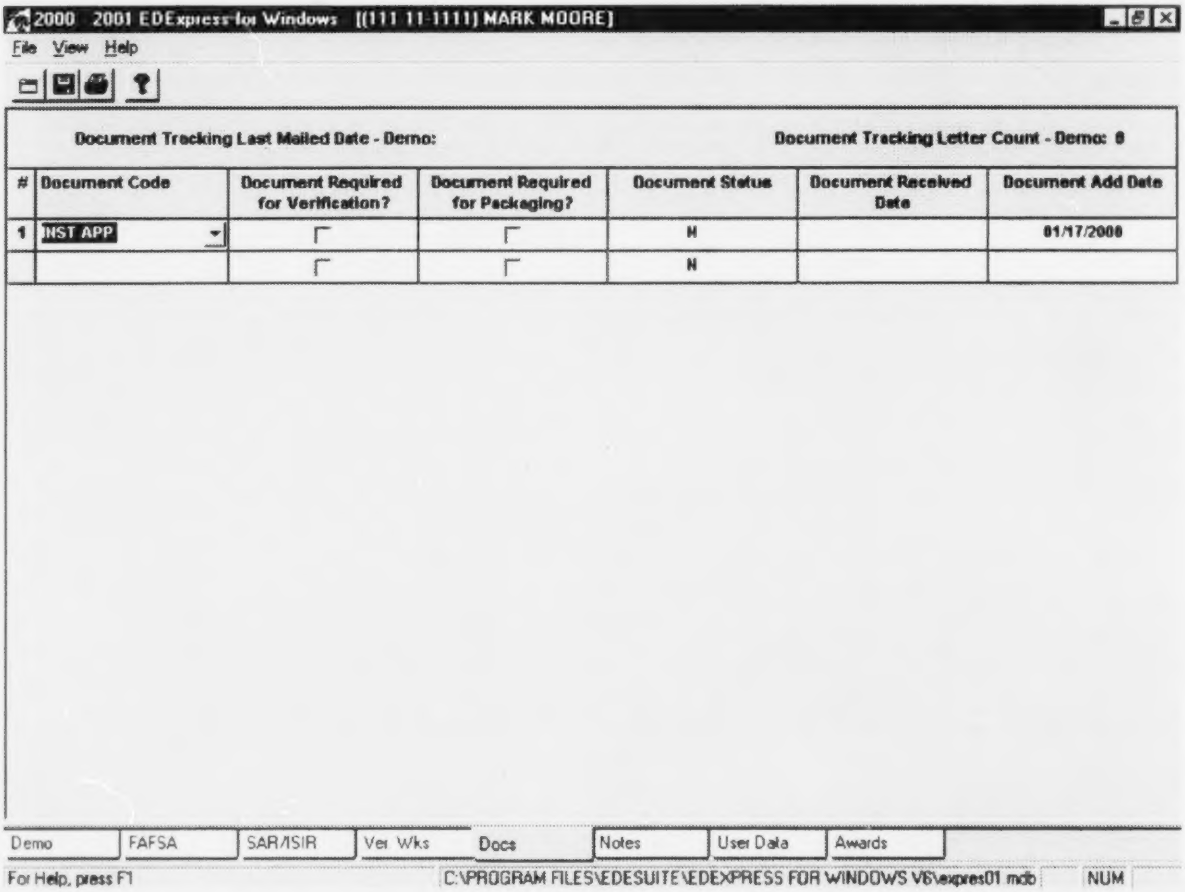
The documents that apply to this record are displayed on the Document Tracking screen.

Tip: If a document has been added using the Add Documents process and you decide that you do not need to request that document from the student, set the Document Status flag to "W" for waived. If you delete the document, it will be added to the record the next time you run the Add Document process.



2000 2001 EDExpress for Windows [(111 11-1111) MARK MOORE]

Document Tracking Last Mailed Date - Demo:

Document Tracking Letter Count - Demo: 0

#	Document Code	Document Required for Verification?	Document Required for Packaging?	Document Status	Document Received Date	Document Add Date
1	NST APP	☐	☐	N		01/17/2000
		☐	☐	N		

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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Manual Entry

*Click on a blank cell in the **Document** column and then click on the down arrow in that cell. Select the document code **TAX RETURN** to track that document for this record.*

*Click on the **diskette icon** to save your changes to the record.*

You can click on the down arrow in a document code cell for a pick list of other documents you can add to the record.

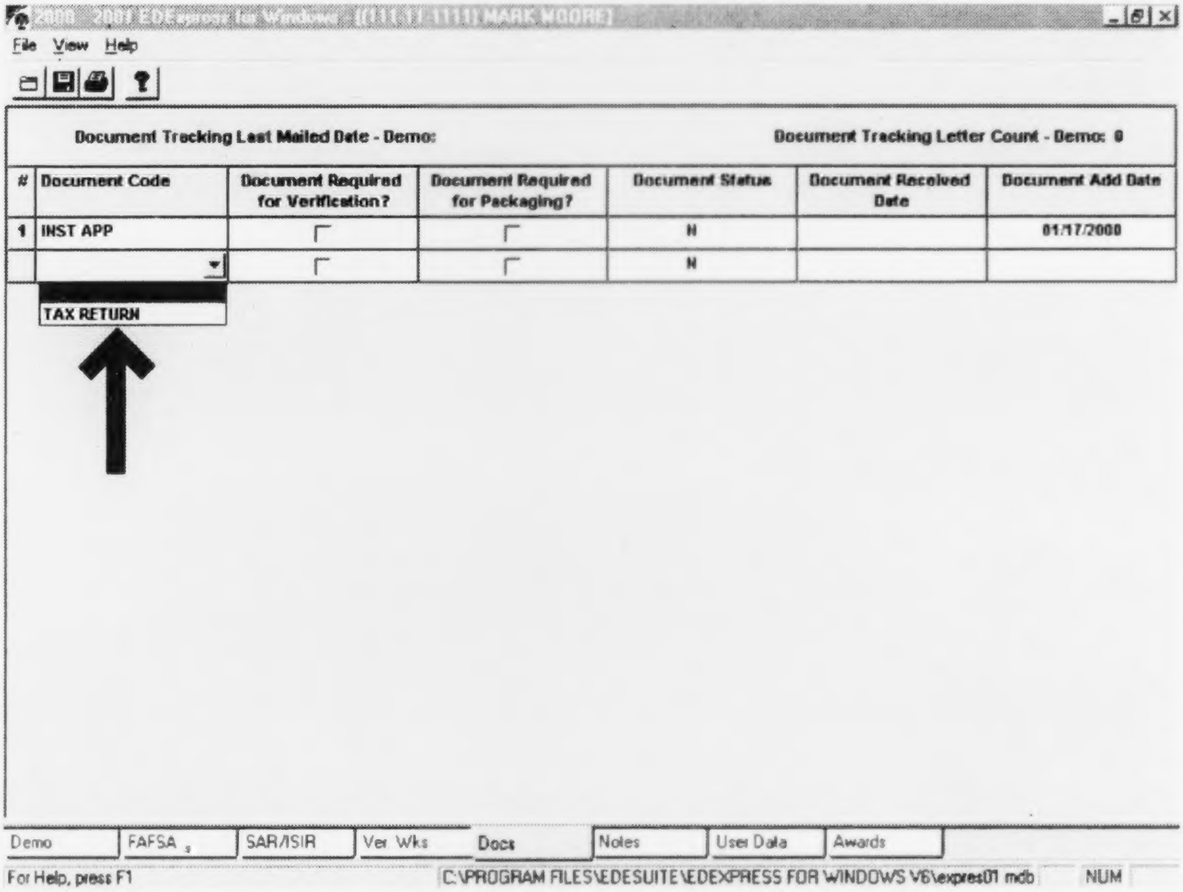
Document Status Codes:

N = Needed

I = Incomplete

R = Received

W = Waived


2000 - 2001 EDExpress for Windows - [(111-11-1111) MARK MOORE]
File
View
Help
TAX RETURN
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards
NUM

Document Tracking Last Mailed Date - Demo:

Document Tracking Letter Count - Demo: 0

#	Document Code	Document Required for Verification?	Document Required for Packaging?	Document Status	Document Received Date	Document Add Date
1	INST APP	☐	☐	N		01/17/2000
		☐	☐	N		

For Help, press F1

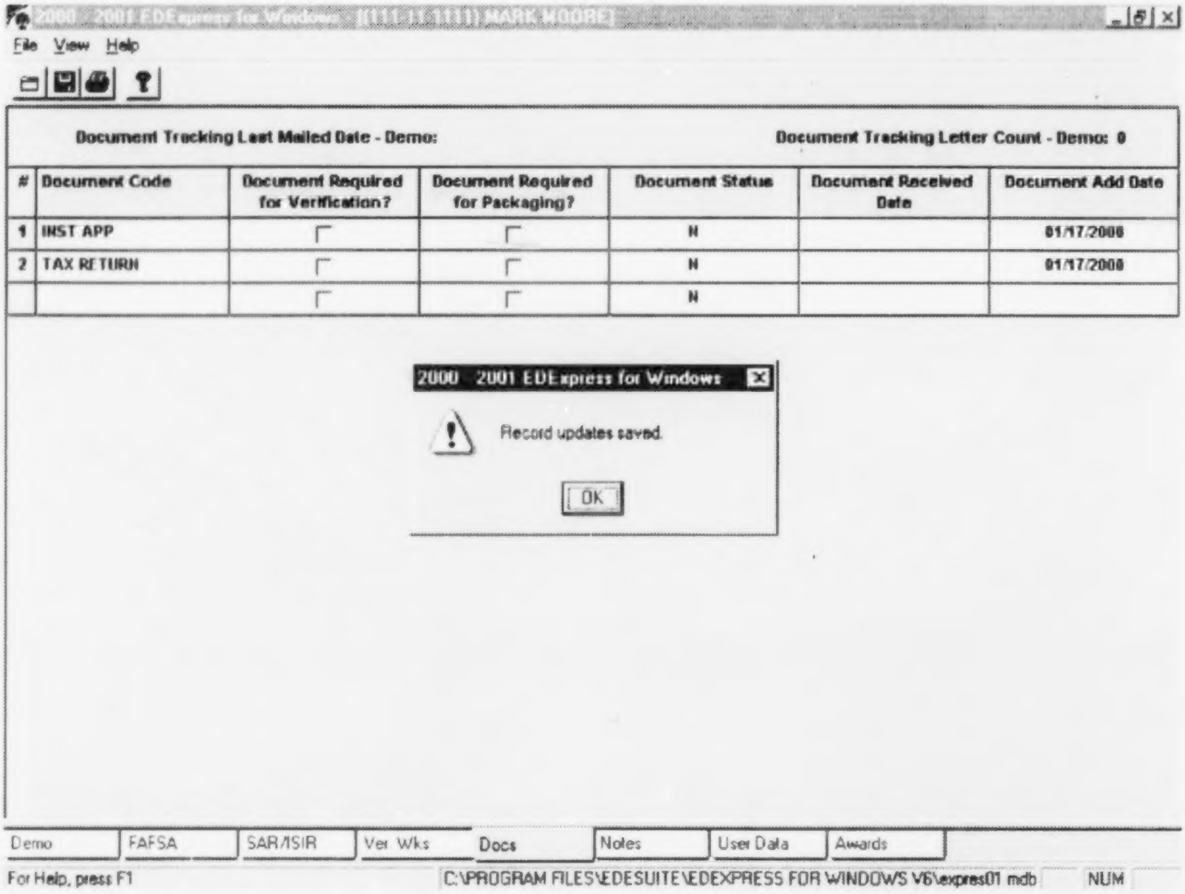
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

A pop-up window displays asking if you want to save the changes

Click **Yes**.

A message displays that indicates your record updates are saved.

Click **OK**.


2000 - 2001 EDExpress for Windows - [(111-11-1111) MARK MOORE]
File
View
Help
2000 - 2001 EDExpress for Windows
OK
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Document Tracking Last Mailed Date - Demo:

Document Tracking Letter Count - Demo: 0

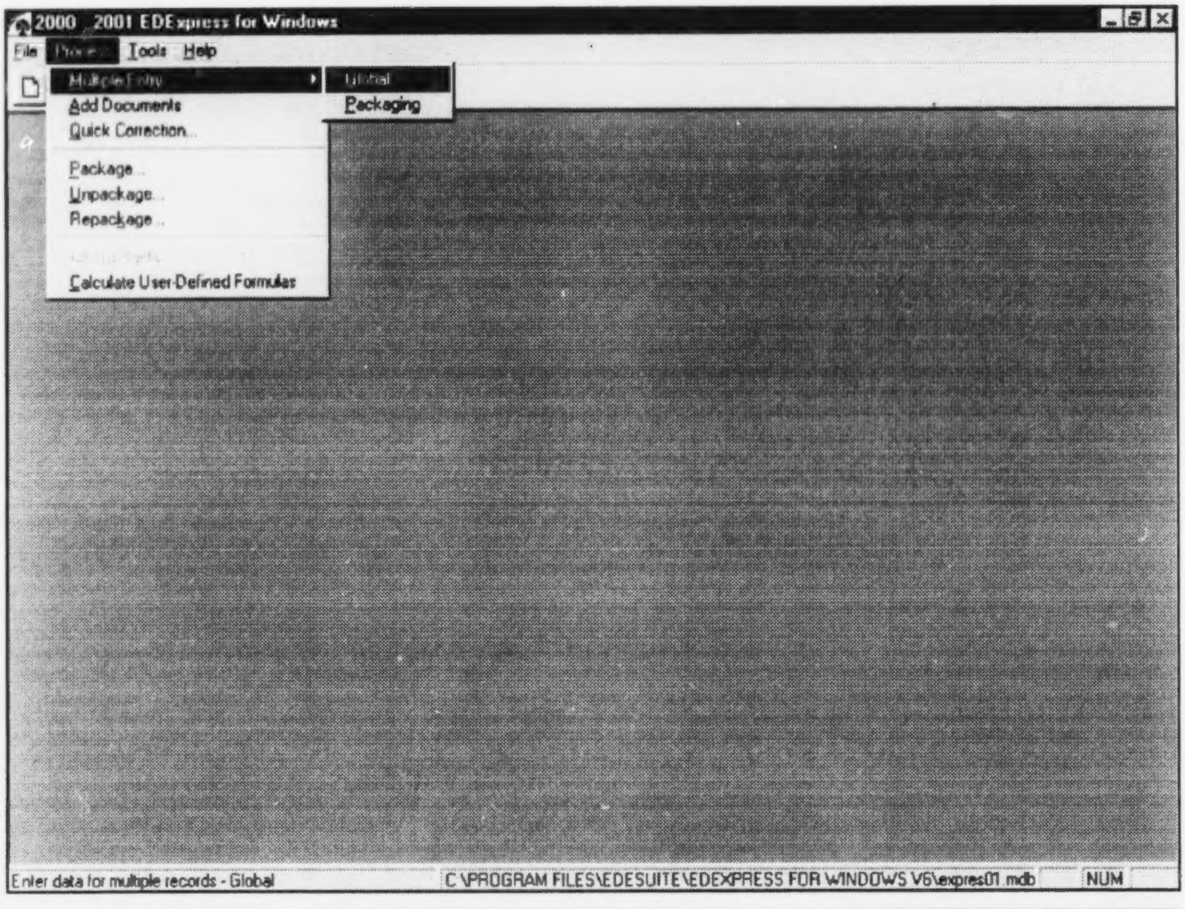
#	Document Code	Document Required for Verification?	Document Required for Packaging?	Document Status	Document Received Date	Document Add Date
1	INST APP	☐	☐	N		01/17/2000
2	TAX RETURN	☐	☐	N		01/17/2000
		☐	☐	N		

Record updates saved.

Multiple Entry

Select ***Process/ Multiple Entry/Global*** *from the menu bar.*

Using the Multiple Entry function, you can add information or update various fields in demographic, packaging, loan, and Pell records for multiple students at one time. First, update each field with the data you want changed on all of the records. Then, specify the group of records by using Selection Criteria or by using a file of SSNs. You can also update the additional fields you created in User Data.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Multiple Entry
Add Documents
Quick Correction...
Package...
Unpackage...
Repackage...
Calculate User-Defined Formulas
Global
Packaging
NUM

Enter data for multiple records - Global

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Use the Global Multiple Entry grid to enter or modify data in the demographic fields.

Click the checkbox in the Select column for each field you want to update on all the records.

In this example, we will add an institutional application to our records and also indicate that we have received it.

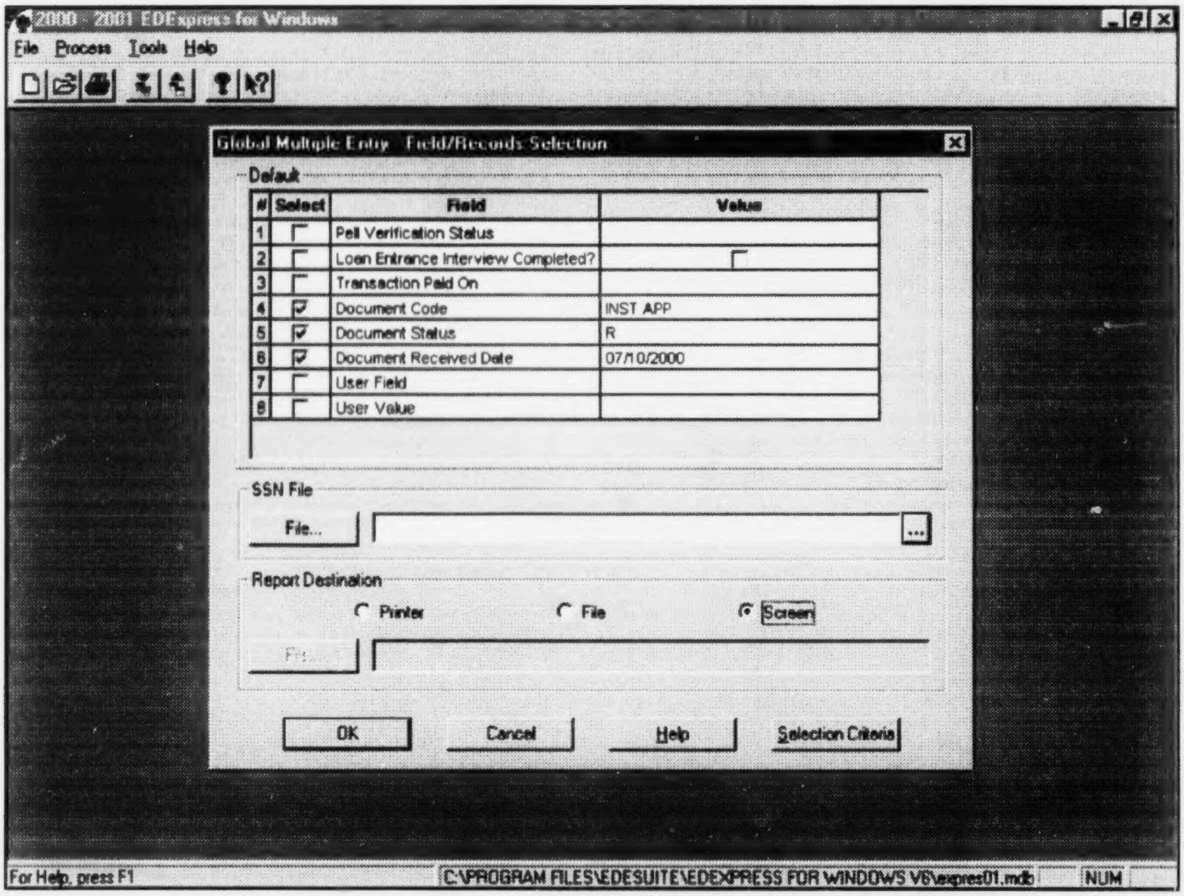
*Select the following values in the Document Code field select **INST APP** from the drop down list.*

*In the Document Status field select **R** for received.*

In the Document Received Date field your current system date will automatically default into the field.

*Select **Screen** as the Report Destination.*

*To find the specific records to update, click **Selection Criteria**.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Global Multiple Entry - Field/Records Selection
Default

#	Select	Field	Value
1	☐	Pell Verification Status	
2	☐	Loan Entrance Interview Completed?	☐
3	☐	Transaction Paid On	
4	☑	Document Code	INST APP
5	☑	Document Status	R
6	☑	Document Received Date	07/10/2000
7	☐	User Field	
8	☐	User Value	

SSN File

Report Destination: ○ Printer ○ File ● Screen

File...
OK
Cancel
Help
Selection Criteria
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

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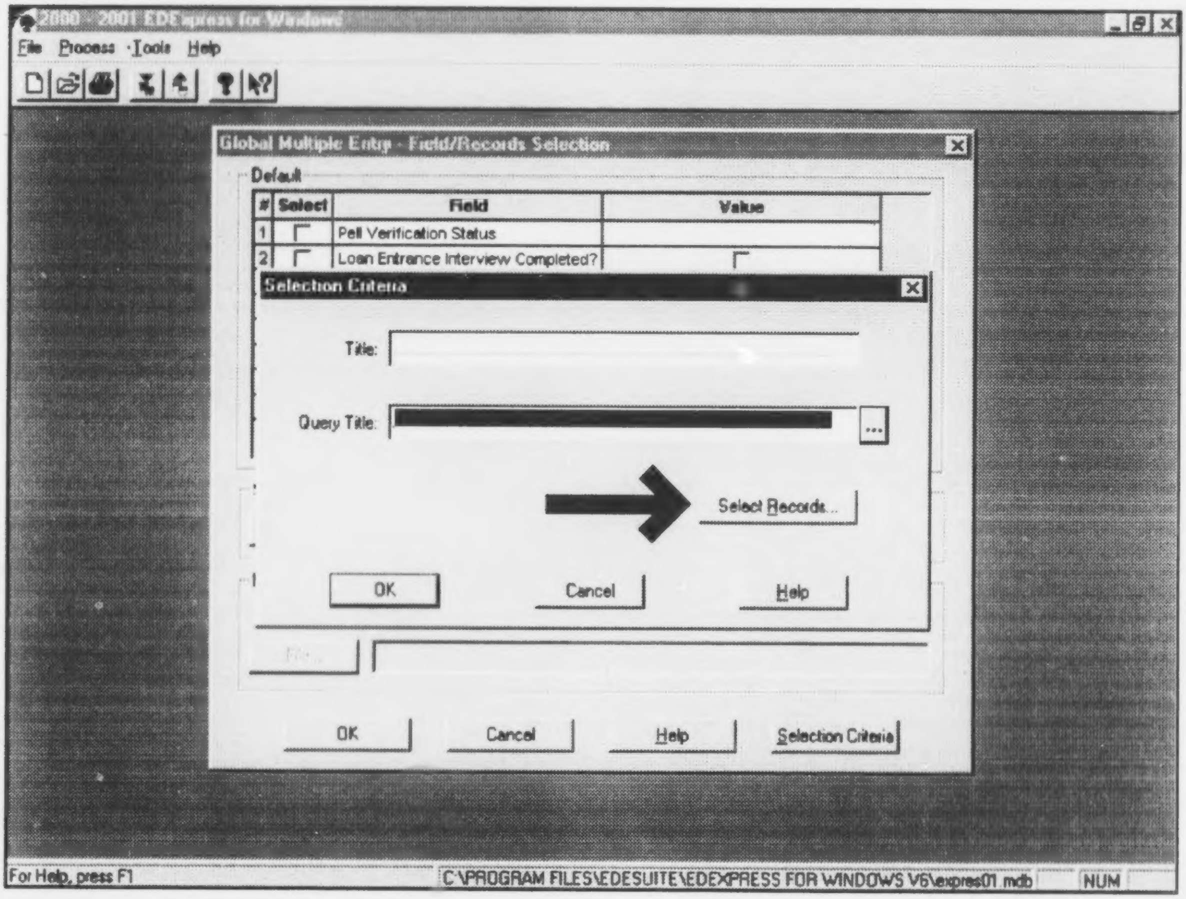
Click the ***Select Records*** *button*

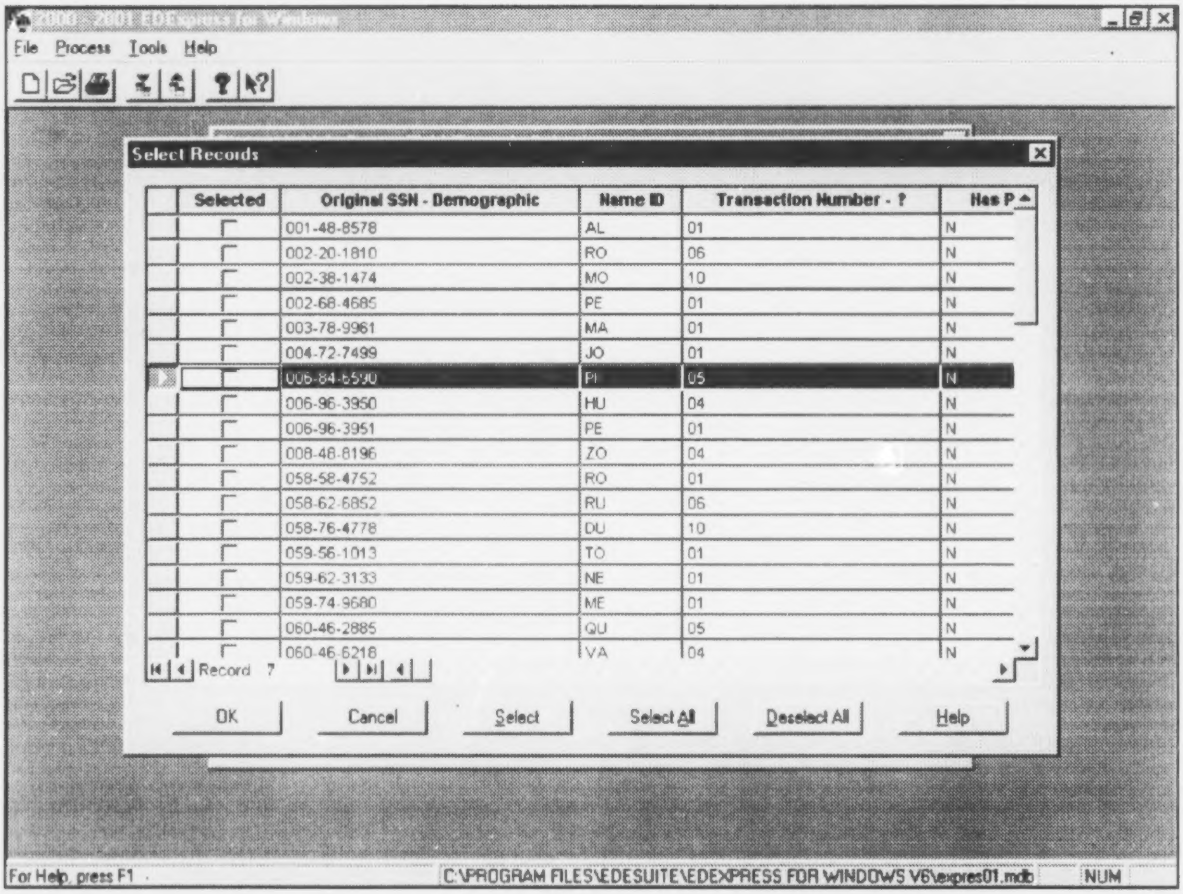
The Selection Criteria pop-up window will be displayed.


2000 - 2001 EDExpress for Windows
File Process Tools Help
Global Multiple Entry - Field/Records Selection
Default
Selection Criteria
Title:
Query Title:
...
Select Records...
OK
Cancel
Help
File...
OK
Cancel
Help
Selection Criteria
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

#	Select	Field	Value
1	☐	Pell Verification Status	
2	☐	Loan Entrance Interview Completed?	☐

Click the checkboxes in the selected column to indicate which records you want to update

*Click **OK***

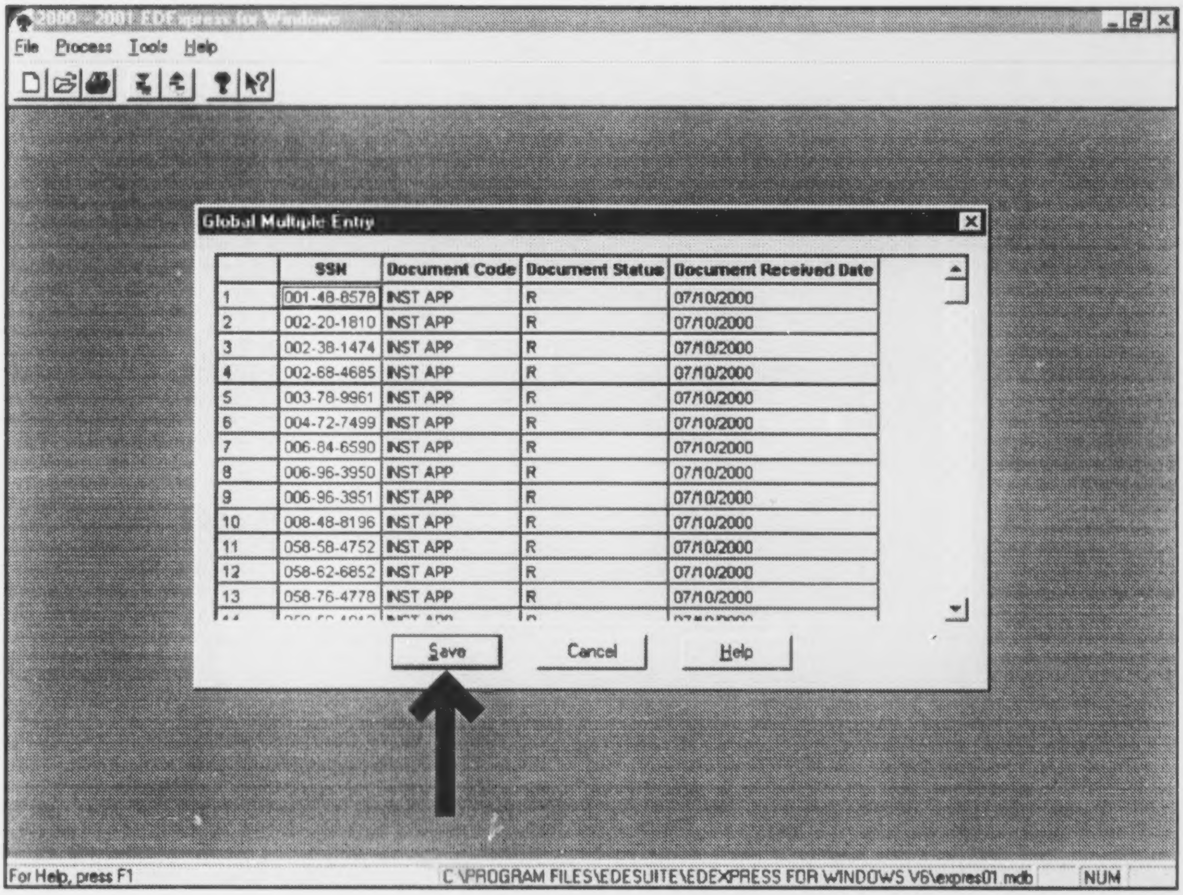

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Select Records
Record 7
OK
Cancel
Select
Select All
Deselect All
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Selected	Original SSN - Demographic	Name ID	Transaction Number - ?	Has P
☐	001-48-8578	AL	01	N
☐	002-20-1810	RO	06	N
☐	002-38-1474	MO	10	N
☐	002-68-4685	PE	01	N
☐	003-78-9961	MA	01	N
☐	004-72-7499	JO	01	N
☐	006-84-6590	PI	05	N
☐	006-96-3950	HU	04	N
☐	006-96-3951	PE	01	N
☐	008-48-8196	ZO	04	N
☐	058-58-4752	RO	01	N
☐	058-62-6852	RU	06	N
☐	058-76-4778	DU	10	N
☐	059-56-1013	TO	01	N
☐	059-62-3133	NE	01	N
☐	059-74-9680	ME	01	N
☐	060-46-2885	QU	05	N
☐	060-46-6218	VA	04	N

*Click **OK**.*

A list of the files you selected to update displays.

*Click **Save** to make the updates.*



2000 - 2001 EDExpress for Windows
File Process Tools Help
Global Multiple Entry
Save
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

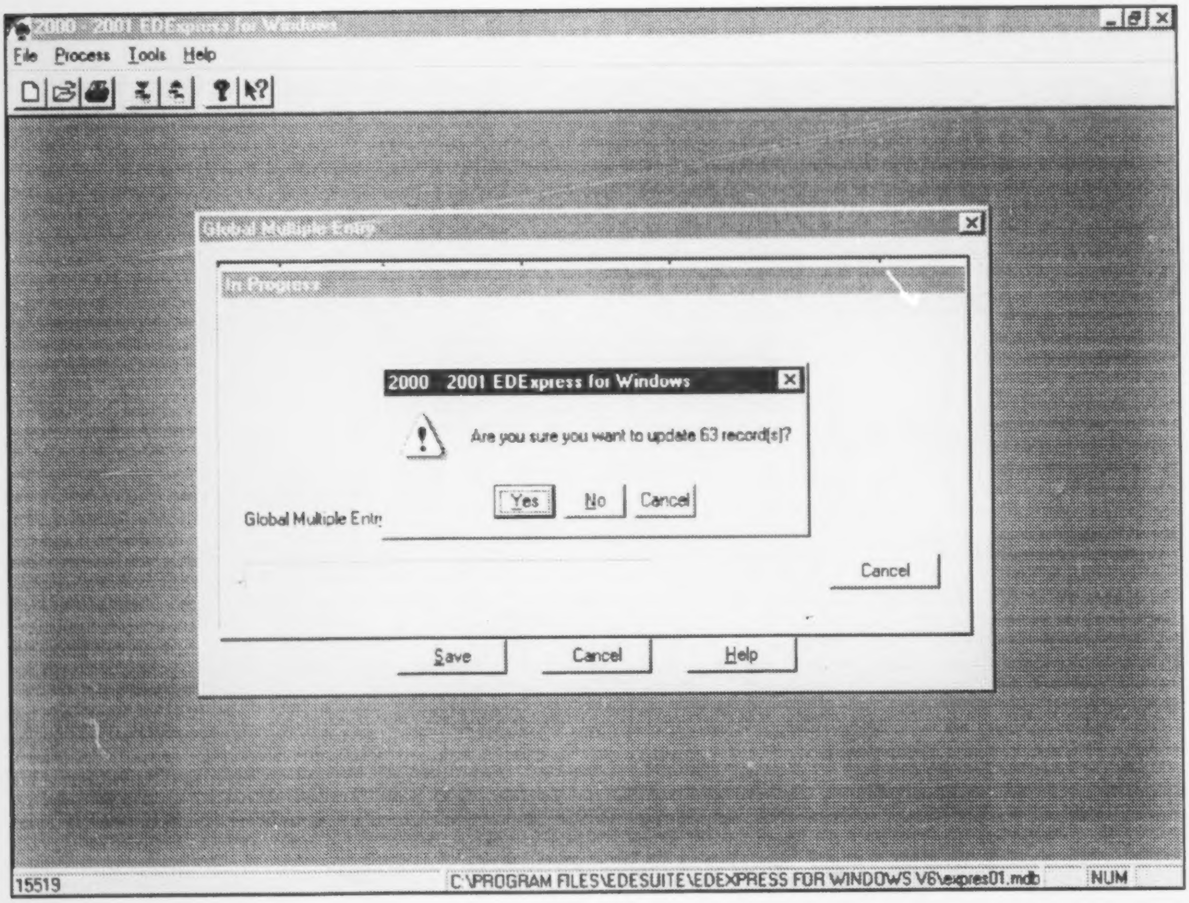
	SSN	Document Code	Document Status	Document Received Date
1	001-48-8578	INST APP	R	07/10/2000
2	002-20-1810	INST APP	R	07/10/2000
3	002-38-1474	INST APP	R	07/10/2000
4	002-68-4685	INST APP	R	07/10/2000
5	003-78-9961	INST APP	R	07/10/2000
6	004-72-7499	INST APP	R	07/10/2000
7	006-84-6590	INST APP	R	07/10/2000
8	006-96-3950	INST APP	R	07/10/2000
9	006-96-3951	INST APP	R	07/10/2000
10	008-48-8196	INST APP	R	07/10/2000
11	058-58-4752	INST APP	R	07/10/2000
12	058-62-6852	INST APP	R	07/10/2000
13	058-76-4778	INST APP	R	07/10/2000

A pop-up window displays asking if you want to save the pending record updates.

*Click **Yes** to continue.*

A second pop-up window displays to verify the update.

*Click **Yes** to update the records.*

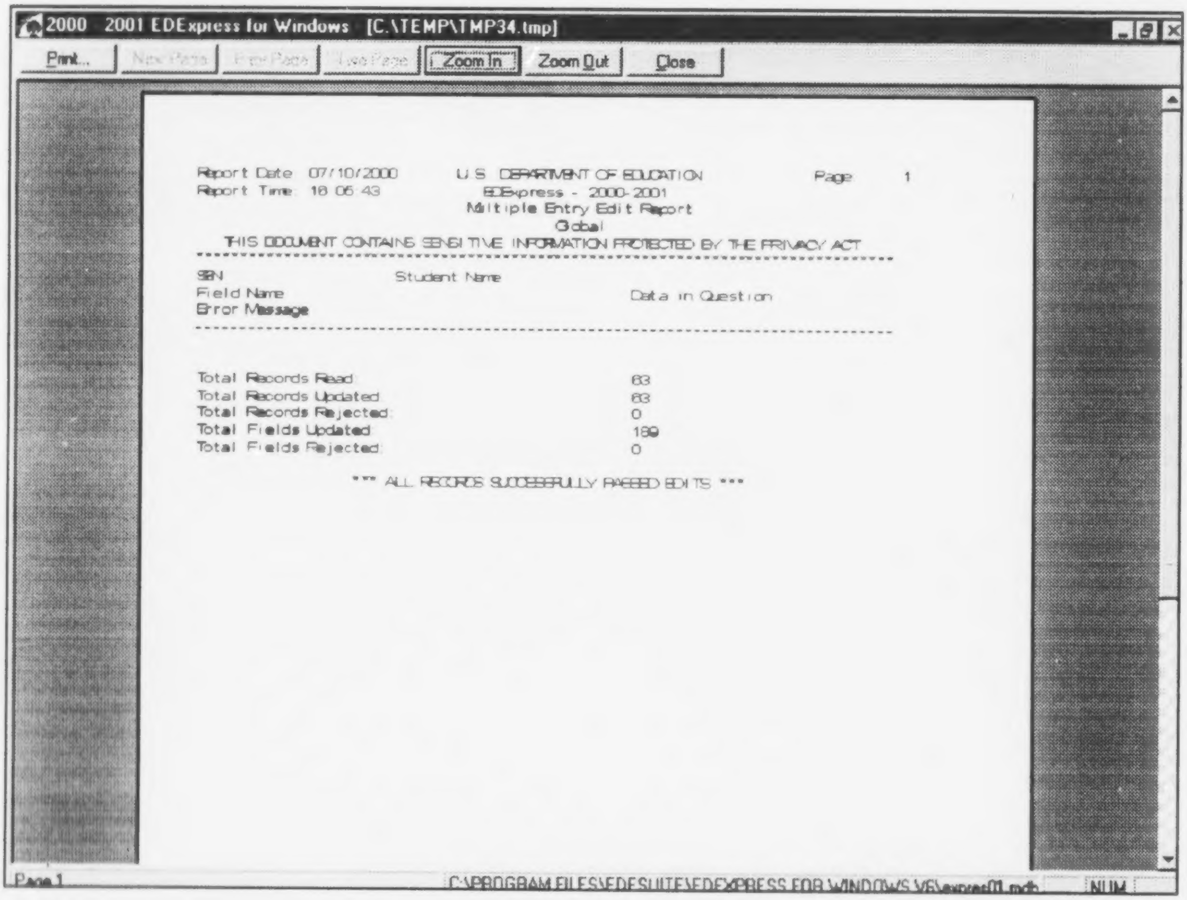

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Global Multiple Entry
In Progress
2000 - 2001 EDExpress for Windows
Yes
No
Cancel
Global Multiple Entry
Cancel
Save
Cancel
Help
15519
NUM

Are you sure you want to update 63 record(s)?

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

*Click the **Close** button when finished viewing the report*

The Multiple Entry Edit Report shows that all 63 records were updated as well as the total number of fields updated.


2000 2001 EDExpress for Windows [C:\TEMP\TMP34.tmp]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

```
Report Date  07/10/2000       U.S. DEPARTMENT OF EDUCATION          Page      1
Report Time  18:05:43             EDExpress - 2000-2001
                               Multiple Entry Edit Report
                                         Global
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
--------------------------------------------------------------------------------
SSN                      Student Name
Field Name                                        Data in Question
Error Message
--------------------------------------------------------------------------------


Total Records Read:                               63
Total Records Updated:                            63
Total Records Rejected:                           0
Total Fields Updated:                             189
Total Fields Rejected:                            0

                  *** ALL RECORDS SUCCESSFULLY PASSED EDITS ***
```

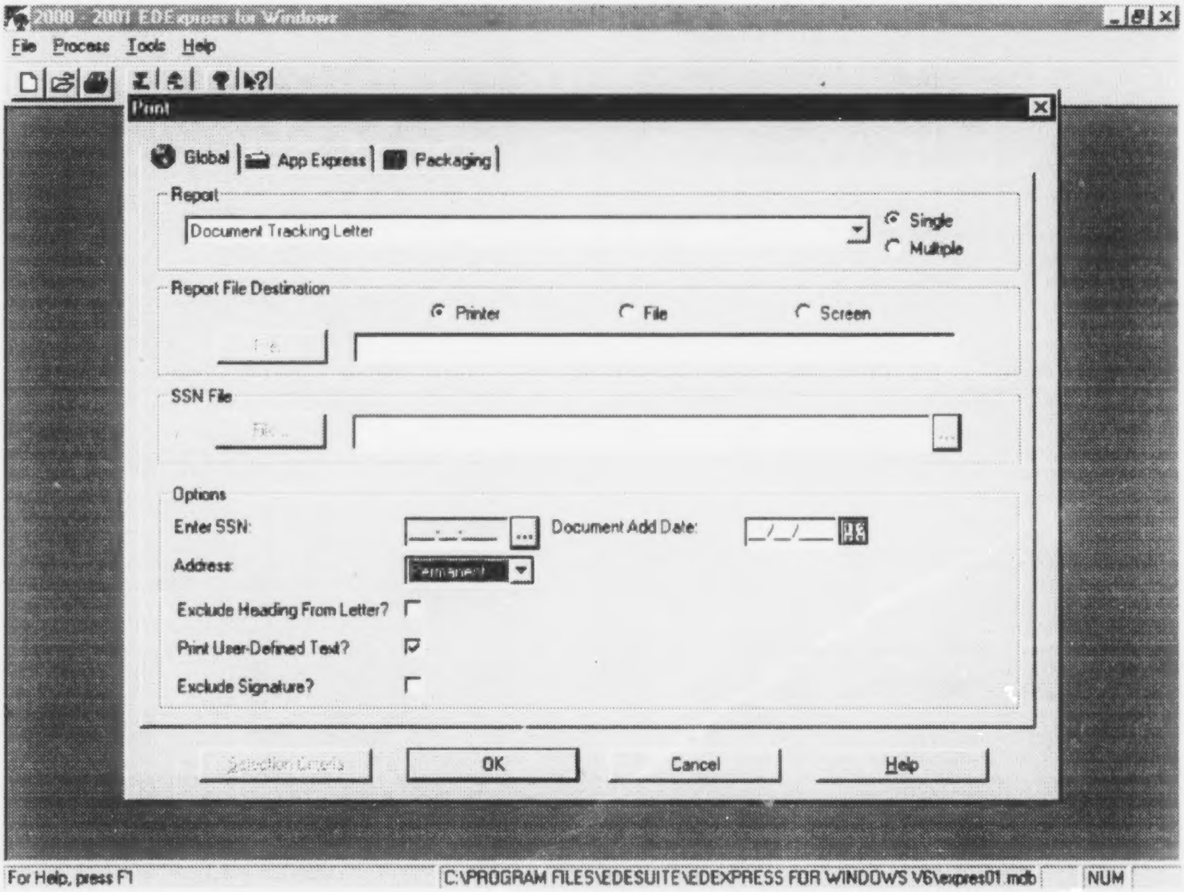
Printing a Document Tracking Letter

Now you are ready to print a Document Tracking letter.

*Select **File/Print** on the main menu bar.*

*Click the **Global** tab.*

*Select the report type **Document Tracking Letter**.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
File...
File...
Selection Criteria
OK
Cancel
Help

Report: Document Tracking Letter
● Single
○ Multiple

Report File Destination
● Printer
○ File
○ Screen

SSN File

Options
Enter SSN: __-__-___
Document Add Date: _/_/___
Address: Permanent
Exclude Heading From Letter? ☐
Print User-Defined Text? ☑
Exclude Signature? ☐

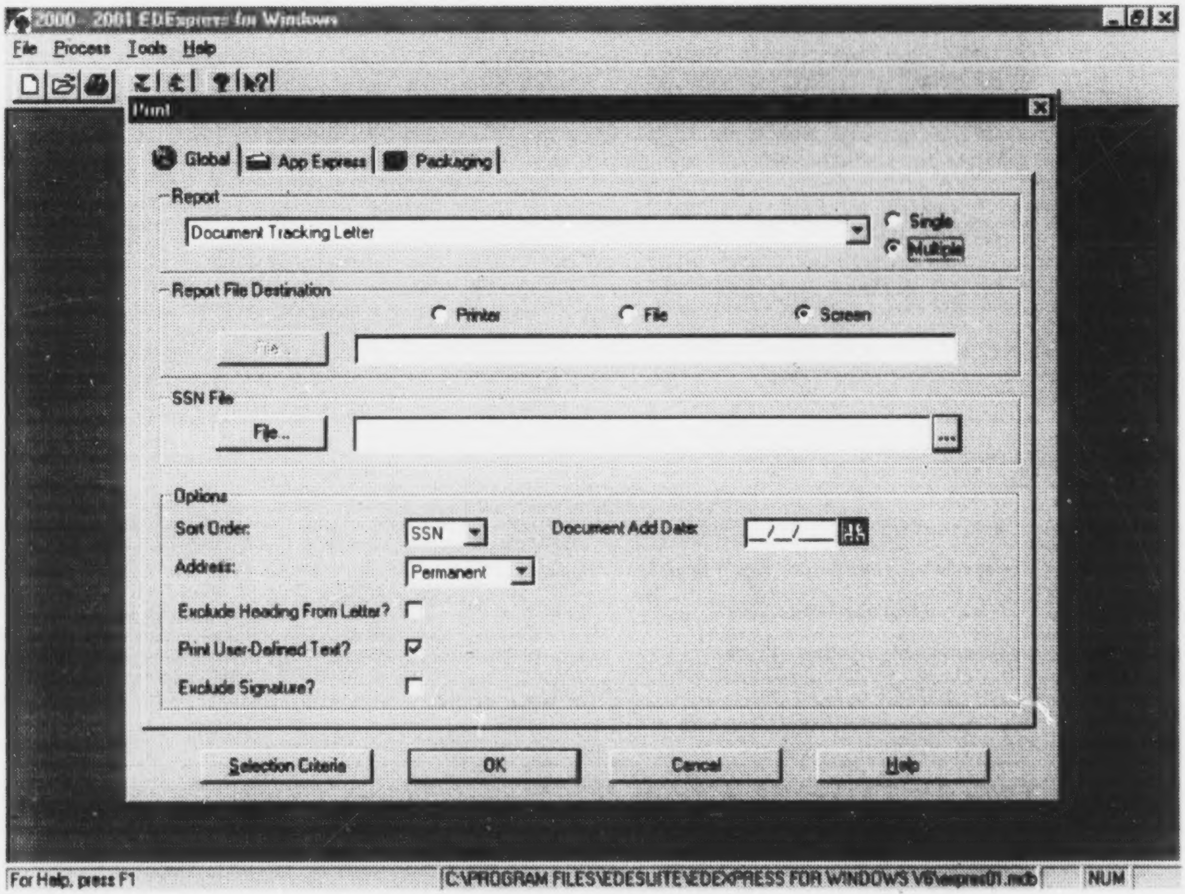
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

*Click **Multiple** to print letters for more than one student.*

*Click **Screen** to view the letters on the screen.*

*Click the **Print User-Defined Text?** checkbox to include the text you created.*

*Click **OK**.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help

Report: Document Tracking Letter

○ Single ● Multiple

Report File Destination: ○ Printer ○ File ● Screen

SSN File: File...

Options

Sort Order: SSN

Document Add Date: __/__/____

Address: Permanent

Exclude Heading From Letter? ☐

Print User-Defined Text? ☑

Exclude Signature? ☐

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

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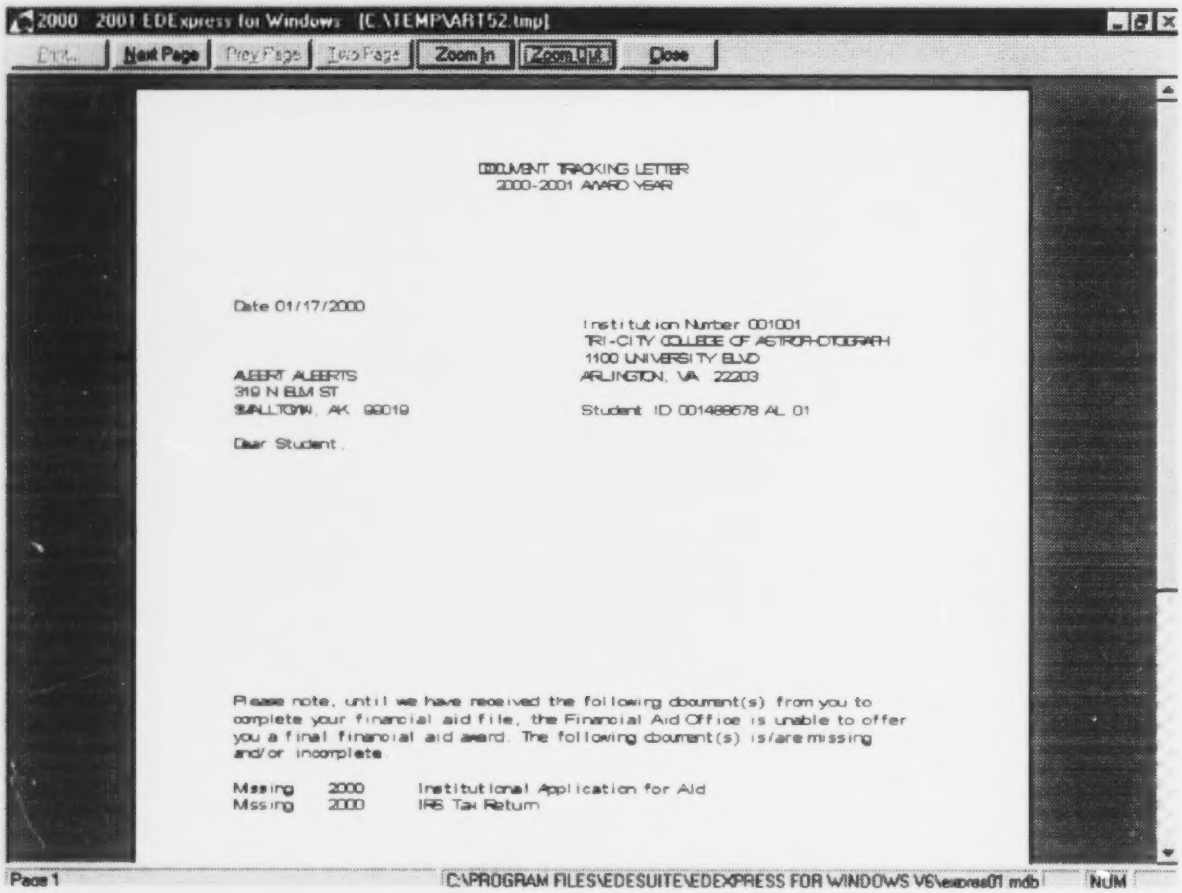
The first part of the letter includes the letter text you created. The second part of the letter identifies the documents that are missing.

*Click **Close** when you are finished viewing the letter.*


2000 2001 EDExpress for Windows [C:\TEMP\ART52.tmp]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

DOCUMENT TRACKING LETTER
2000-2001 AWARD YEAR

Date 01/17/2000

Institution Number 001001
TRI-CITY COLLEGE OF ASTROPHOTOGRAPH
1100 UNIVERSITY BLVD
ARLINGTON, VA 22203

ALBERT ALBERTS
319 N ELM ST
SMALLTOWN, AK 99019

Student ID 001488678 AL 01

Dear Student,

Please note, until we have received the following document(s) from you to complete your financial aid file, the Financial Aid Office is unable to offer you a final financial aid award. The following document(s) is/are missing and/or incomplete.

Missing 2000 Institutional Application for Aid
Missing 2000 IRS Tax Return

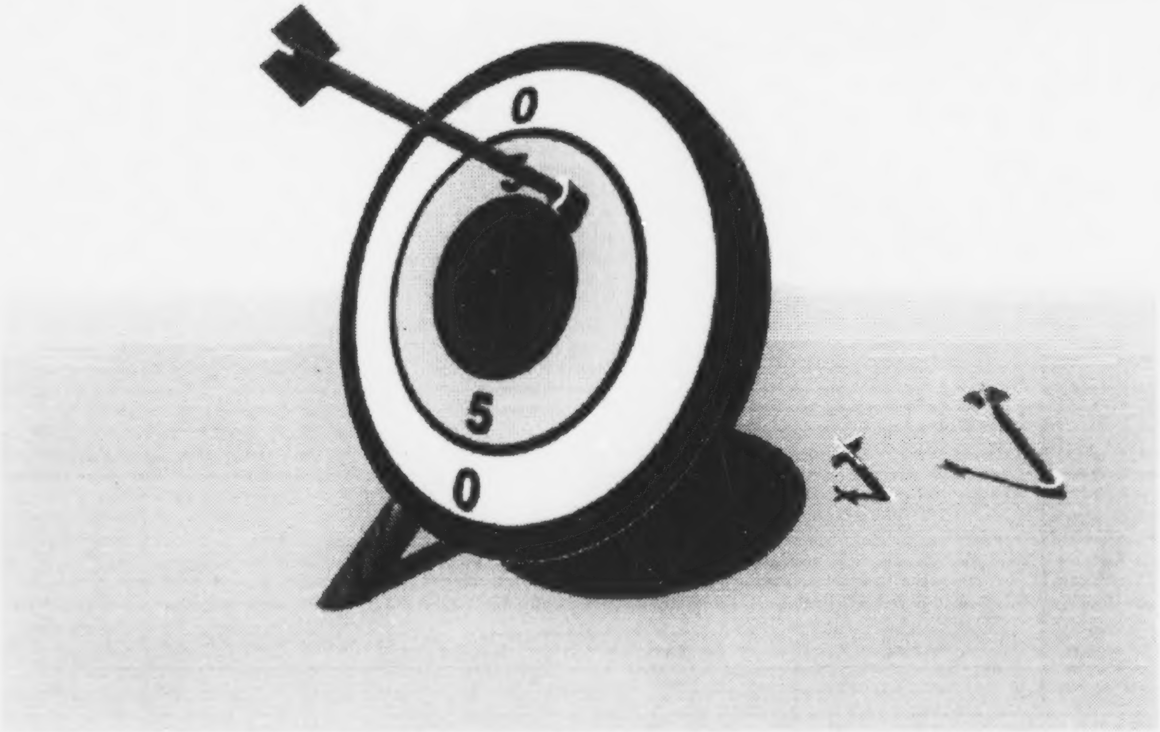
Resolving Rejected Data

Occasionally, certain types of data are rejected for different reasons. There are two types of rejected data: EDE and CPS. EDE rejects occur when information in a specific field or an incorrect Batch ID does not allow records to be processed. CPS rejects occur when a record can be processed but errors in the data prevent the EFC from being calculated.

CPS Rejects

CPS rejects include verifiable and non-verifiable rejects. Verifiable rejects occur when data items cause a reject but may be correct. They are identified by an alpha character. Non-verifiable rejects are numeric and occur when data items cause a reject that must be corrected to a different value. They are identified by a numeric code. In order to resolve rejected CPS data, you must identify the reject reason using the reject code, make corrections to the appropriate fields, and resubmit.

Note: The information in the following tables can also be found in the EDE Technical Reference and the Application Processing Desk Reference, as well as through the view messages function in EDExpress.



Verifiable FAFSA Reject Codes

These are the only codes for rejected data that you or the student can change or verify as correct. You may revise these data or leave them unchanged.

Reject Code	Reject Reason	Resolution
B	Independent Student Date of birth = to or greater than Sept. 1, 1984 and not equal to or greater than current year	Verify or correct the following: - Date of Birth
N	Either first name or last name blank	Verify or correct the following: - Student's Last Name - Student's First Name - Student may have only one name, but it must be verified
W	Questionable number of family members	*If the applicant is dependent, verify or correct the following:* - Parents Number of Family Members *If the applicant is independent, verify or correct the following:* - Student's Number of Family Members

Non-Verifiable Rejects

Reject Code	Reject Reason	Resolution
1	Simplified needs test is not met and all supplemental data are blank.	*If the applicant is dependent, provide the following:* - Parents' Cash, Savings and Checking - Parents' Other Real Estate/Investment Net Worth - Parents' Business Net Worth - Parents' Investment Farm New Worth *If the applicant is independent, provide the following:* - Student's Cash, Savings, and Checking - Student's Other Real Estate/Investment Net Worth - Student's Business Net Worth - Student's Investment Farm Net Worth
2	Incomplete Application Renewal Application or Correction	*If the applicant is dependent, provide the following:* - Parents' Taxed and Untaxed Income *If the applicant is independent, provide the following:* - Student's and Spouse's Taxed and Untaxed Income
5	Missing or invalid date of birth	Correct the following: - Date of Birth

8	SSN match with date of death	*If the SSN is correct*, the applicant must contact the Social Security Administration *If the SSN is incorrect*, the applicant must correct the Social Security Number – See SAR/ISIR Guide Appendix B
10	Missing marital status and household size	*If the applicant is dependent*, provide the following: - Parents' Marital Status - Parents' Number of Family Members *If the applicant is independent*, provide the following: - Student's Marital Status - Student's Number of Family Members
11	Marital status is inconsistent with base year income. (Not married, but two incomes reported.)	*If the applicant is dependent*, correct one or more of the following: - Parent's Marital Status - Father's 1999 Income - Mother's 1999 Income *If the applicant is independent*, correct one or more of the following: - Student's Marital Status - Student's 1999 Income - Spouse's 1999 Income
13	Both First and Last names are blank.	Provide the following: - Student's Last Name - Student's First Name
15	Parent did not sign and a Dependent student on both APP or SAR.	Signature correction must be made on a printed SAR certification page and resubmitted to the FAFSA Processor or may be corrected electronically.
16	Unsigned FAFSA Express , COTW, ROTW, FOTW Certification Document	Signature correction must be made on a printed SAR certification page and resubmitted to the FAFSA Processor or may be corrected electronically.
17	Citizenship information is blank and/or no ARN provided.	Correct the following: - Citizenship Status and/or ARN
18	SSN not on Social Security Administration's database	The applicant must contact the Social Security Administration.
19	An EFC cannot be calculated because student is on a verification or drug abuse hold.	The applicant must call 202/708-4766 or 202/260-9988, or 202/708-5129 depending on which comment was received, to resolve this matter.

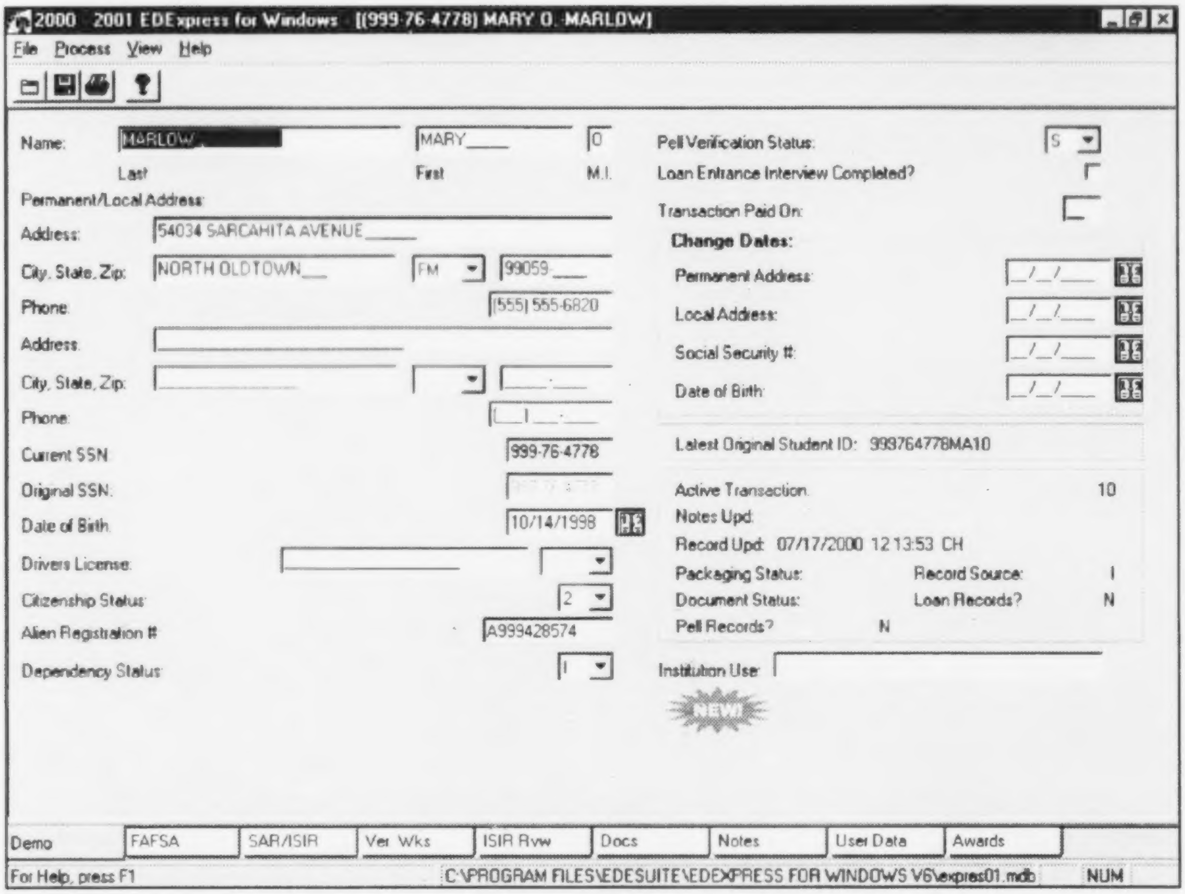
Corrections

EDExpress provides several methods for making corrections to ISIR/SAR data. You can open an existing record and use the ISIR tab to make corrections, you can use the Quick Correction feature, or you can also make corrections using the Verification Worksheet tab.

Correcting a rejected record using the ISIR tab

To make a correction using the ISIR tab, you first need to open the student's record. The demographic tab is displayed.

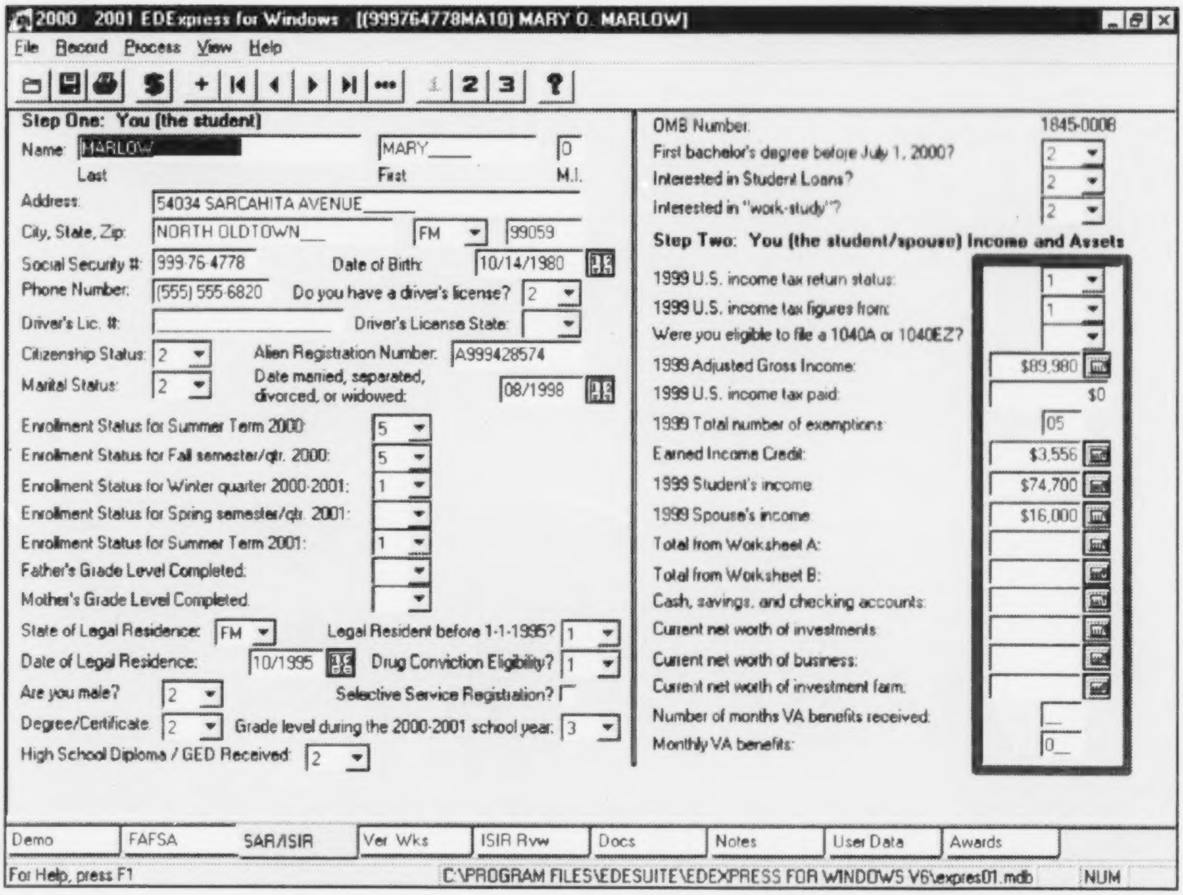
Use the Institution Use field to record values up to 20 characters that may be included in a query.


2000 - 2001 EDExpress for Windows - [(999-76-4778) MARY O. MARLOW]
File
Process
View
Help
Last
First
M.I.
Permanent/Local Address:
Change Dates:
NEW!
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Name: MARLOW MARY O
Address: 54034 SARCAHITA AVENUE
City, State, Zip: NORTH OLDTOWN FM 99059
Phone: (555) 555-6820
Current SSN: 999-76-4778
Date of Birth: 10/14/1998
Citizenship Status: 2
Alien Registration #: A999428574
Dependency Status: I
Pell Verification Status: S
Latest Original Student ID: 999764778MA10
Active Transaction: 10
Record Upd: 07/17/2000 12:13:53 CH
Record Source: I
Loan Records? N
Pell Records? N

*Click on page **3** to view the reject codes*

Click on the SAR/ISIR tab to review the ISIR data.



Step One: You (the student)

Name: MARLOW (Last) MARY (First) O (M.I.)
Address: 54034 SARCAHITA AVENUE
City, State, Zip: NORTH OLDTOWN FM 99059
Social Security #: 999-76-4778
Date of Birth: 10/14/1980
Phone Number: (555) 555-6820
Do you have a driver's license? 2
Driver's Lic. #:
Driver's License State:
Citizenship Status: 2
Alien Registration Number: A999428574
Marital Status: 2
Date married, separated, divorced, or widowed: 08/1998
Enrollment Status for Summer Term 2000: 5
Enrollment Status for Fall semester/qtr. 2000: 5
Enrollment Status for Winter quarter 2000-2001: 1
Enrollment Status for Spring semester/qtr. 2001:
Enrollment Status for Summer Term 2001: 1
Father's Grade Level Completed:
Mother's Grade Level Completed:
State of Legal Residence: FM
Legal Resident before 1-1-1995? 1
Date of Legal Residence: 10/1995
Drug Conviction Eligibility? 1
Are you male? 2
Selective Service Registration? ☐
Degree/Certificate: 2
Grade level during the 2000-2001 school year: 3
High School Diploma / GED Received: 2

OMB Number: 1845-0008
First bachelor's degree before July 1, 2000? 2
Interested in Student Loans? 2
Interested in "work-study"? 2

Step Two: You (the student/spouse) Income and Assets

1999 U.S. income tax return status: 1
1999 U.S. income tax figures from: 1
Were you eligible to file a 1040A or 1040EZ?
1999 Adjusted Gross Income: $89,980
1999 U.S. income tax paid: $0
1999 Total number of exemptions: 05
Earned Income Credit: $3,556
1999 Student's income: $74,700
1999 Spouse's income: $16,000
Total from Worksheet A:
Total from Worksheet B:
Cash, savings, and checking accounts:
Current net worth of investments:
Current net worth of business:
Current net worth of investment farm:
Number of months VA benefits received:
Monthly VA benefits: 0

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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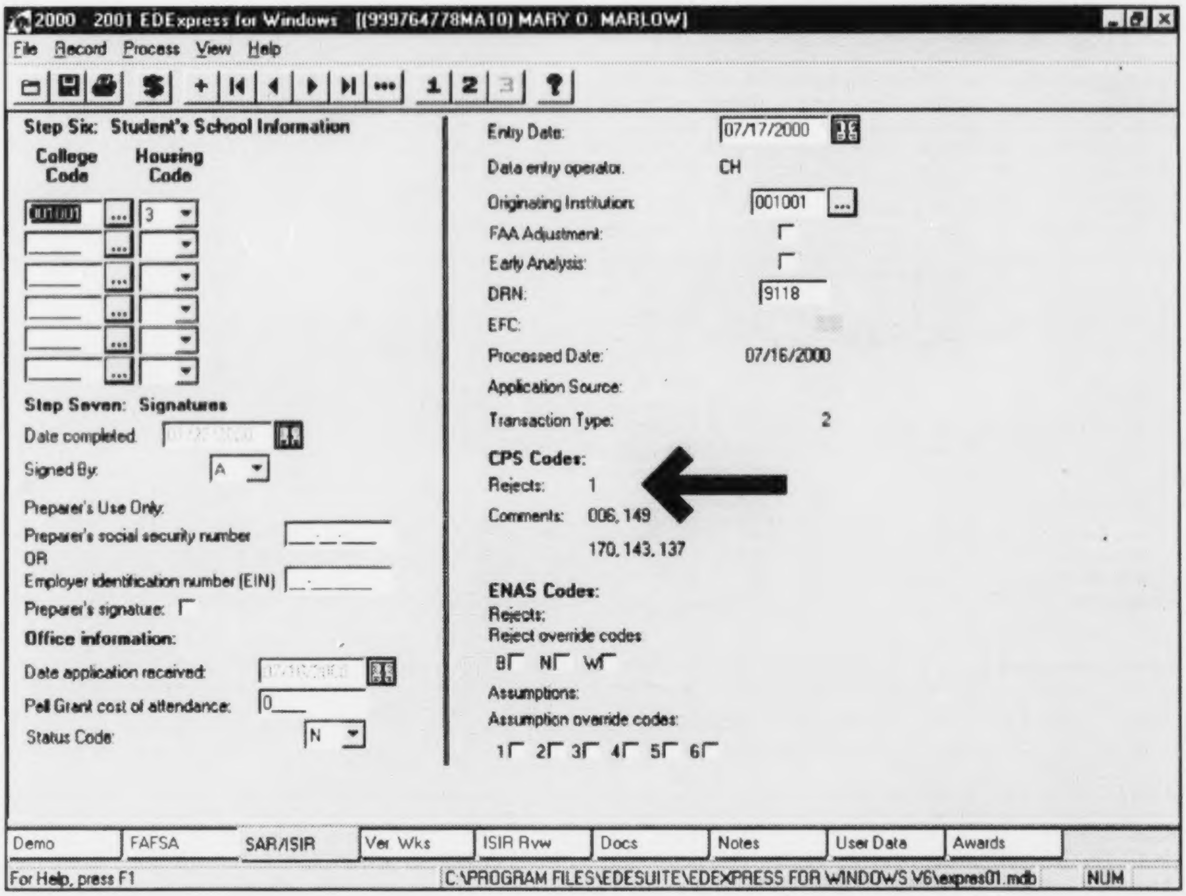
This record has a reject code of 1.


2000 - 2001 EDExpress for Windows - [(999764778MA10) MARY O. MARLOW]
File Record Process View Help
1 2 3
Demo FAFSA SAR/ISIR Ver. Wks ISIR Rvw Docs Notes User Data Awards

Step Six: Student's School Information

College Code: 001001 Housing Code: 3

Step Seven: Signatures

Date completed:

Signed By: A

Preparer's Use Only:

Preparer's social security number ___-__-___

OR

Employer identification number (EIN) __-_______

Preparer's signature: ☐

Office information:

Date application received:

Pell Grant cost of attendance: 0

Status Code: N

Entry Date: 07/17/2000

Data entry operator: CH

Originating Institution: 001001

FAA Adjustment: ☐

Early Analysis: ☐

DRN: 9118

EFC:

Processed Date: 07/16/2000

Application Source:

Transaction Type: 2

CPS Codes:

Rejects: 1

Comments: 006, 149
170, 143, 137

ENAS Codes:

Rejects:

Reject override codes

B☐ N☐ W☐

Assumptions:

Assumption override codes:

1☐ 2☐ 3☐ 4☐ 5☐ 6☐

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

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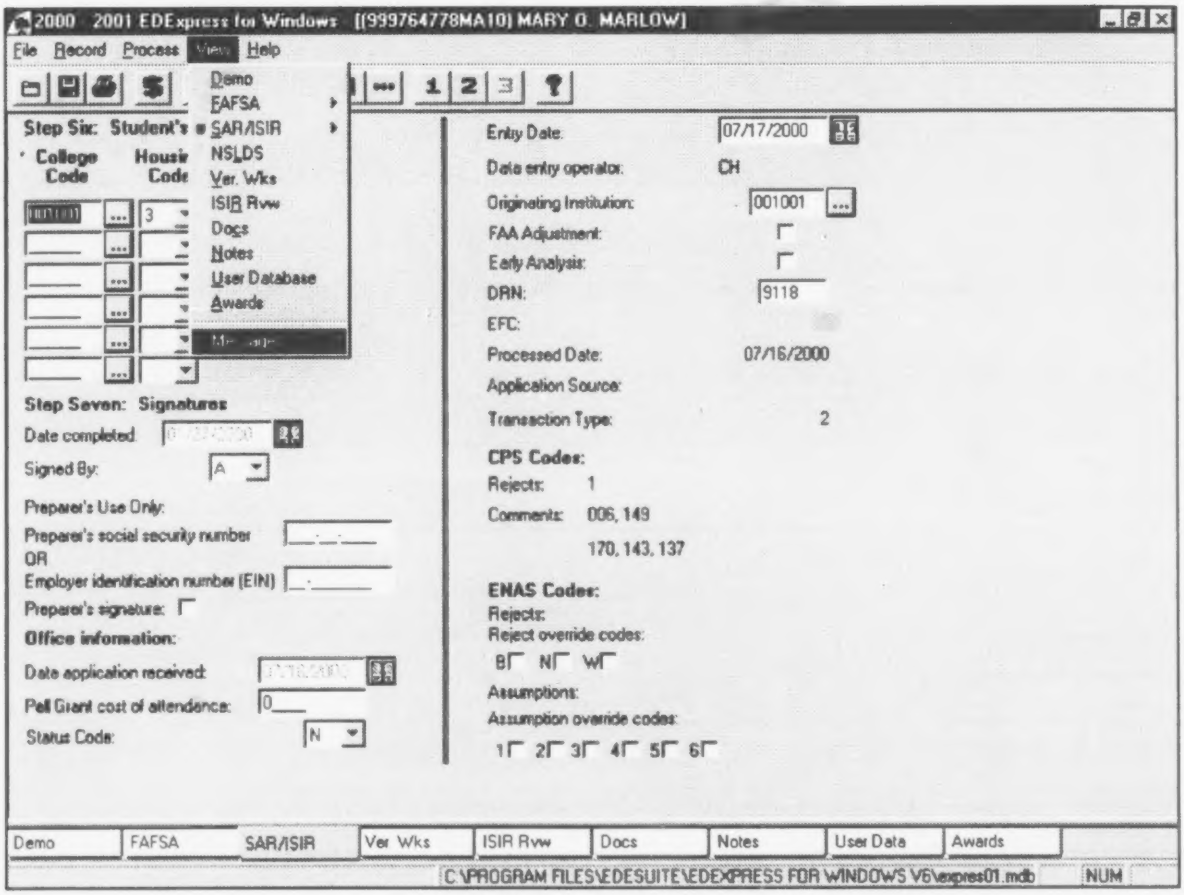
Select ***View/Messages*** *from the menu bar*

You can find out what data fields are in question by using the View/ Messages function.


2000 2001 EDExpress for Windows [(999764778MA10) MARY O. MARLOW]
File
Record
Process
View
Help
1
2
3
Demo
FAFSA
SAR/ISIR
NSLDS
Ver. Wks
ISIR Rvw
Docs
Notes
User Database
Awards
Messages
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
NUM

Step Six: Student's

College Code	Housing Code
	3

Step Seven: Signatures

Date completed:

Signed By: A

Preparer's Use Only:

Preparer's social security number ___-__-____

OR

Employer identification number (EIN) __-_______

Preparer's signature: ☐

Office information:

Date application received:

Pell Grant cost of attendance: 0

Status Code: N

Entry Date: 07/17/2000

Data entry operator: CH

Originating Institution: 001001

FAA Adjustment: ☐

Early Analysis: ☐

DRN: 9118

EFC:

Processed Date: 07/16/2000

Application Source:

Transaction Type: 2

CPS Codes:

Rejects: 1

Comments: 006, 149
170, 143, 137

ENAS Codes:

Rejects:

Reject override codes:

B☐ N☐ W☐

Assumptions:

Assumption override codes:

1☐ 2☐ 3☐ 4☐ 5☐ 6☐

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

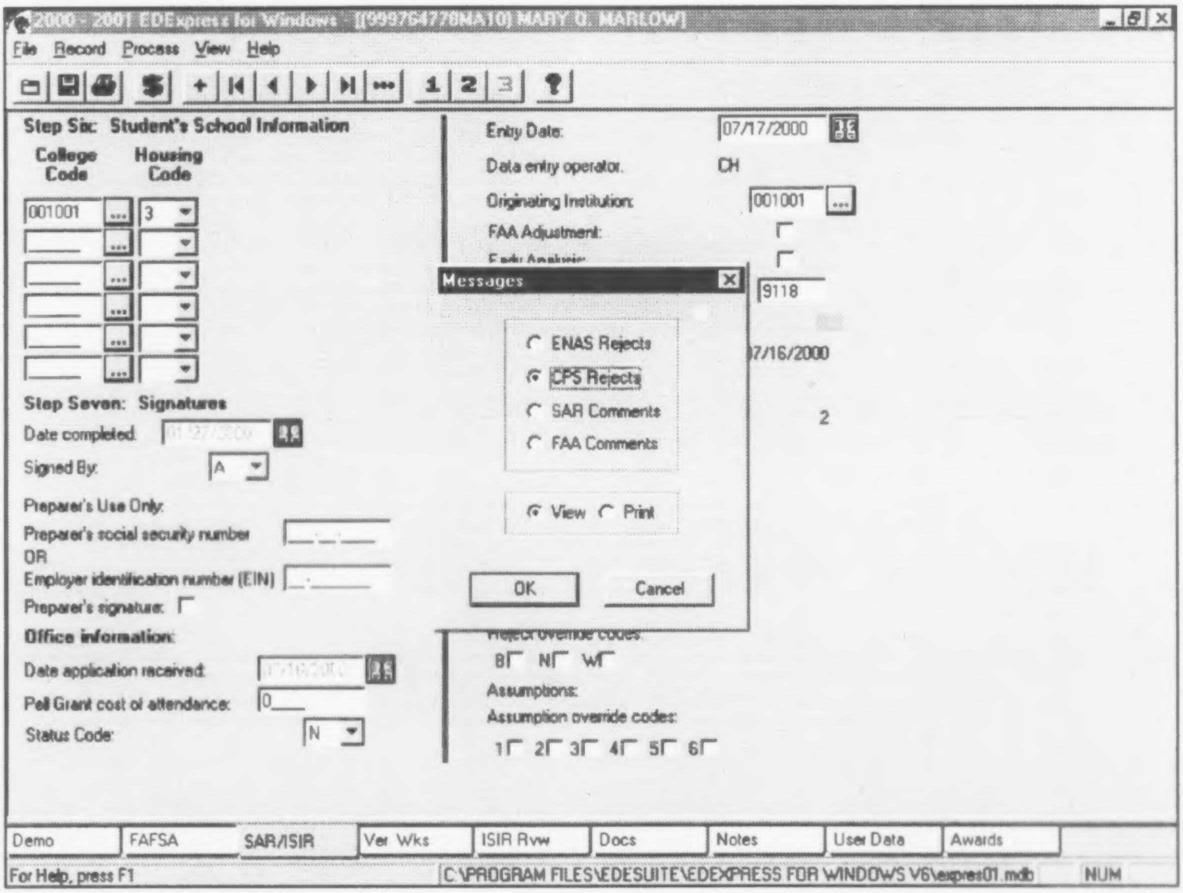
Four types of messages are available:

1. ENAS Rejects displays any edit features caused by the data you have entered.
2. CPS Rejects displays the reason(s) the record was rejected by CPS and the data fields to review and/or correct.
3. SAR Comments displays all comment text relevant to the record.
4. FAA Comments displays only those comments targeted to you in the financial aid office.

*If you want to find out about reject code 1, click on **CPS Rejects**.*

*Click on **View** or **Print** to determine output.*

*Click **OK**.*


2000 - 2001 EDExpress for Windows - [[999764778MA10] MARY O. MARLOW]
File Record Process View Help
1 2 3
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Step Six: Student's School Information

College Code	Housing Code
001001	3

Step Seven: Signatures

Date completed: 01/27/2000

Signed By: A

Preparer's Use Only:

Preparer's social security number ___-__-____

OR

Employer identification number (EIN) __-_______

Preparer's signature: ☐

Office information:

Date application received: 07/16/2000

Pell Grant cost of attendance: 0

Status Code: N

Entry Date: 07/17/2000

Data entry operator: CH

Originating Institution: 001001

FAA Adjustment: ☐

Early Analysis: ☐

9118

07/16/2000

2

Reject override codes:

B☐ N☐ W☐

Assumptions:

Assumption override codes:

1☐ 2☐ 3☐ 4☐ 5☐ 6☐

Messages

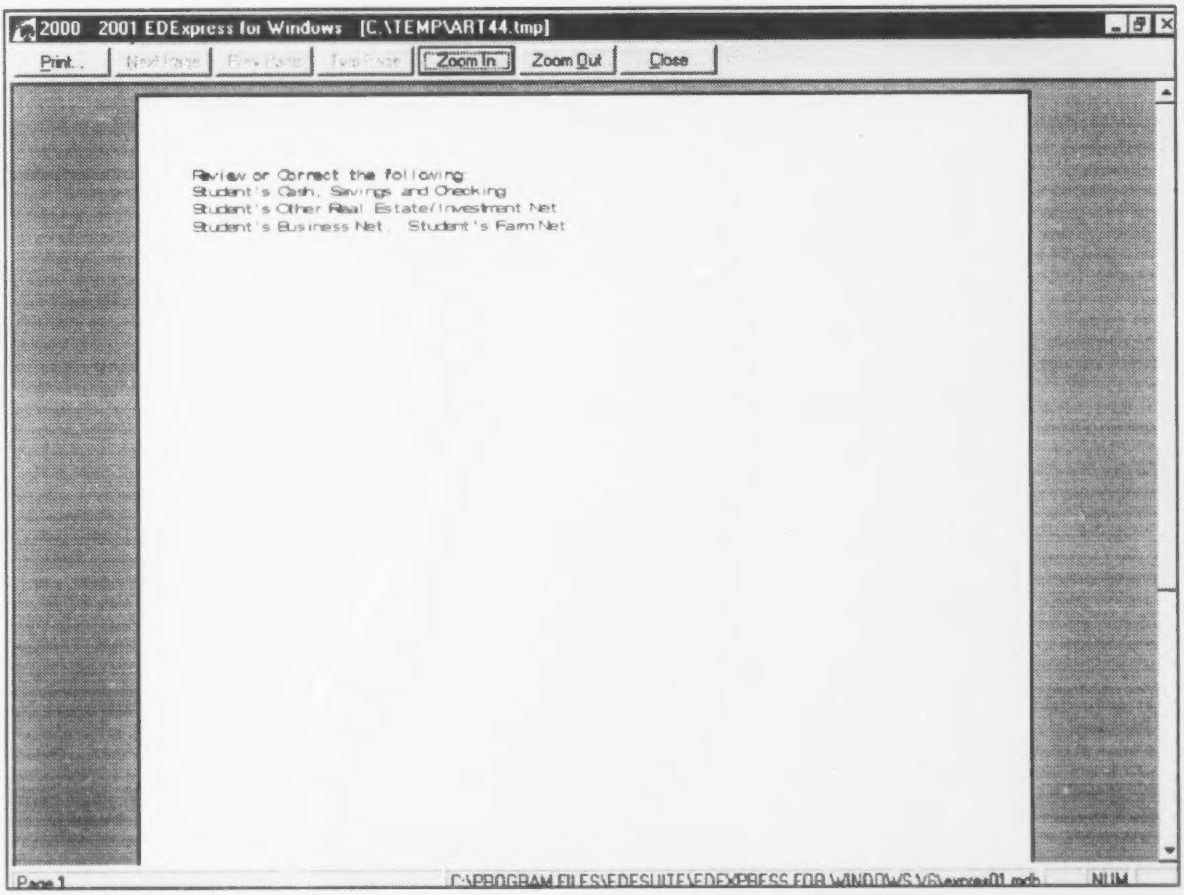
○ ENAS Rejects
● CPS Rejects
○ SAR Comments
○ FAA Comments

● View ○ Print

OK Cancel

Click on the ***Close*** *button to close the window*

Reject Code 1 is a non-verifiable reject. You must verify or correct the field(s) to resolve the reject. In this case, student financial information appears to be missing.


2000 2001 EDExpress for Windows [C:\TEMP\ART44.tmp]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Review or Correct the following:
Student's Cash, Savings and Checking
Student's Other Real Estate/Investment Net
Student's Business Net, Student's Farm Net

The fields in question are located on page 1 of the ISIR. In this example, the documentation submitted by the student provides the necessary financial information.

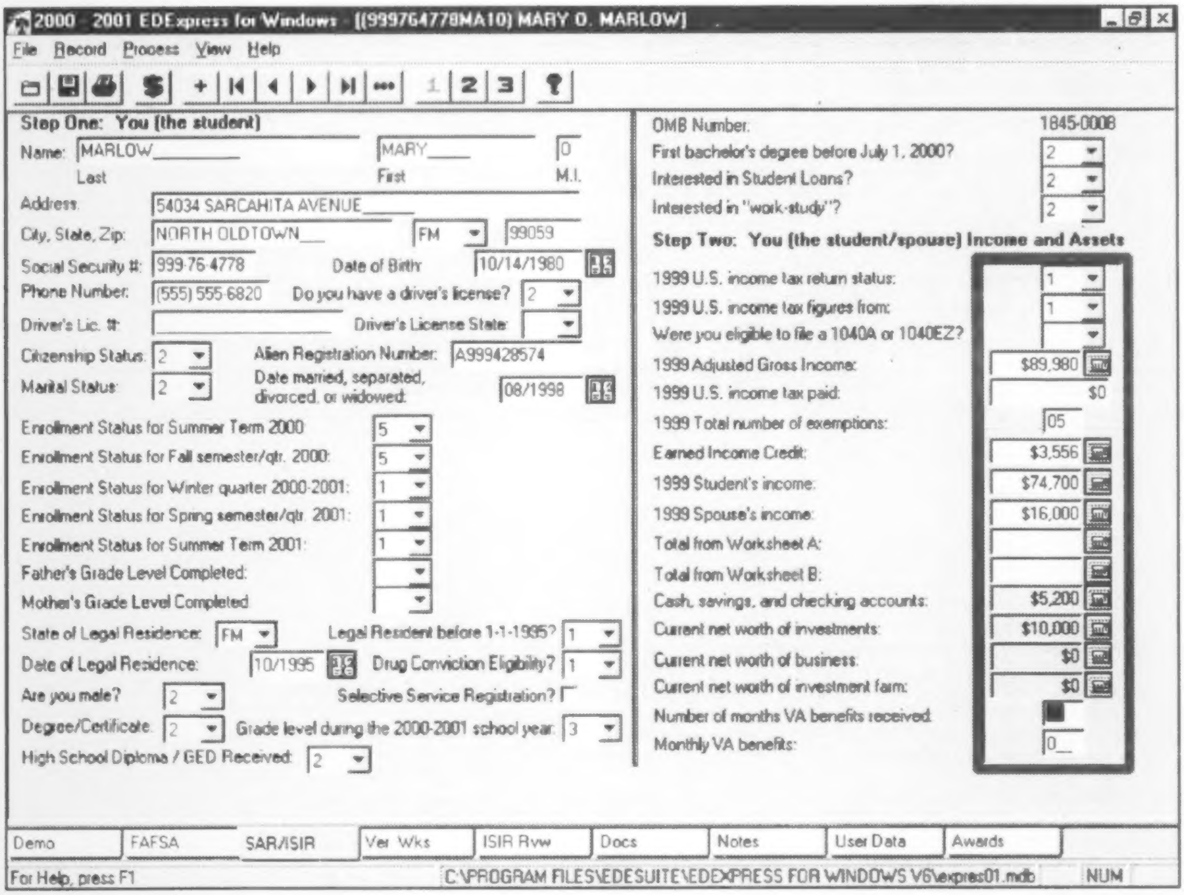
Click on the ***Student's Cash, Savings and Checking*** *Field and enter* ***5,200.00****.*

Click on the ***Current Net Worth of Investments*** *field and enter 10,000.00.*

In the next two fields, enter ***zero*** *for the dollar amounts.*

The fields are highlighted in blue to indicate a correction.

Click ***File/Save*** *or the blue diskette icon to save the changes made.*



2000 - 2001 EDExpress for Windows - [(999764778MA10) MARY O. MARLOW]

Step One: You (the student)

Name: MARLOW (Last) MARY (First) 0 (M.I.)
Address: 54034 SARCAHITA AVENUE
City, State, Zip: NORTH OLDTOWN FM 99059
Social Security #: 999-76-4778
Date of Birth: 10/14/1980
Phone Number: (555) 555-6820
Do you have a driver's license? 2
Driver's Lic. #:
Driver's License State:
Citizenship Status: 2
Alien Registration Number: A999428574
Marital Status: 2
Date married, separated, divorced, or widowed: 08/1998
Enrollment Status for Summer Term 2000: 5
Enrollment Status for Fall semester/qtr. 2000: 5
Enrollment Status for Winter quarter 2000-2001: 1
Enrollment Status for Spring semester/qtr. 2001: 1
Enrollment Status for Summer Term 2001: 1
Father's Grade Level Completed:
Mother's Grade Level Completed:
State of Legal Residence: FM
Legal Resident before 1-1-1995? 1
Date of Legal Residence: 10/1995
Drug Conviction Eligibility? 1
Are you male? 2
Selective Service Registration? ☐
Degree/Certificate: 2
Grade level during the 2000-2001 school year: 3
High School Diploma / GED Received: 2

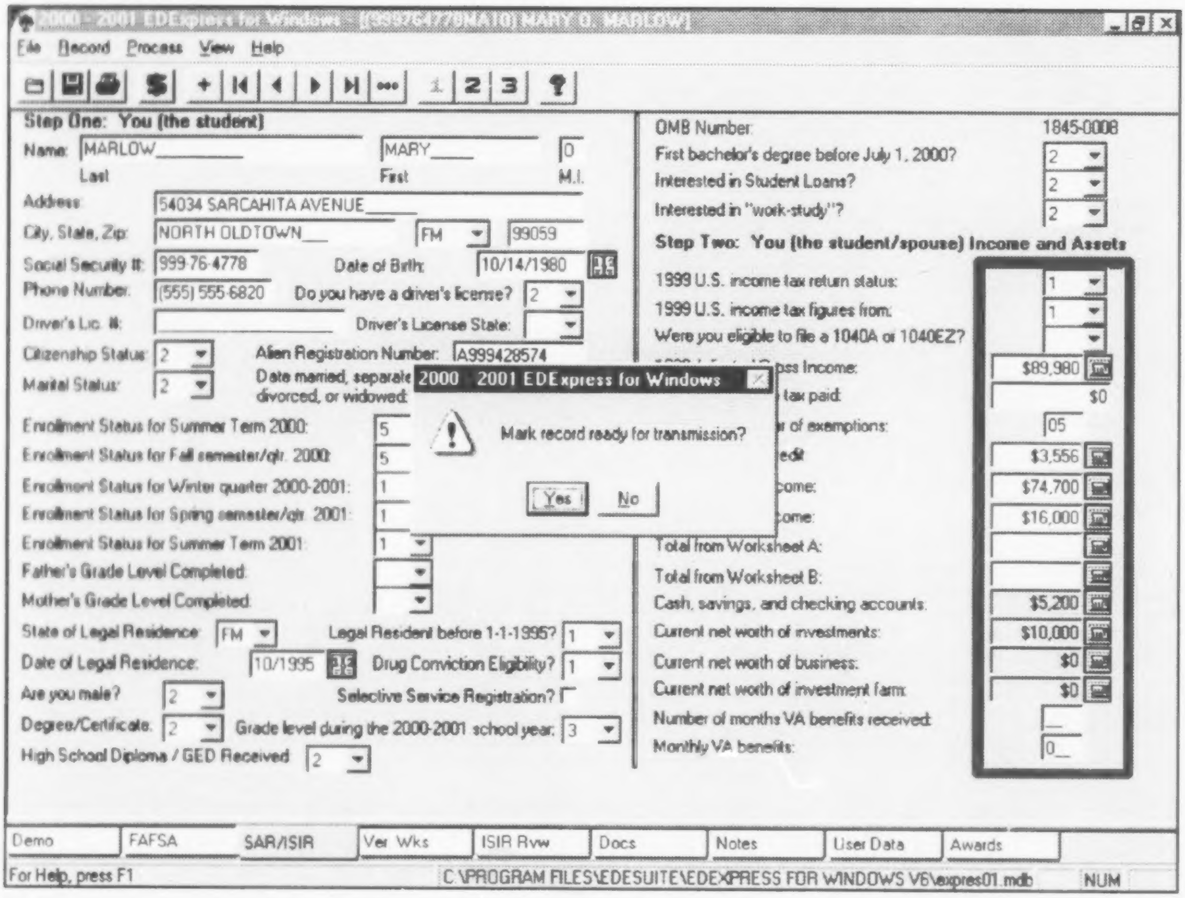
OMB Number: 1845-0008
First bachelor's degree before July 1, 2000? 2
Interested in Student Loans? 2
Interested in "work-study"? 2

Step Two: You (the student/spouse) Income and Assets

1999 U.S. income tax return status: 1
1999 U.S. income tax figures from: 1
Were you eligible to file a 1040A or 1040EZ?
1999 Adjusted Gross Income: $89,980
1999 U.S. income tax paid: $0
1999 Total number of exemptions: 05
Earned Income Credit: $3,556
1999 Student's income: $74,700
1999 Spouse's income: $16,000
Total from Worksheet A:
Total from Worksheet B:
Cash, savings, and checking accounts: $5,200
Current net worth of investments: $10,000
Current net worth of business: $0
Current net worth of investment farm: $0
Number of months VA benefits received:
Monthly VA benefits: 0

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

*Click **Yes** to update the status code (R = Ready for transmission)*


2000 - 2001 EDExpress for Windows - [999764778MA10] MARY O. MARLOW]
File Record Process View Help
1 2 3
Yes
No
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
NUM

Step One: You (the student)

Name: MARLOW (Last) MARY (First) O (M.I.)
Address: 54034 SARCAHITA AVENUE
City, State, Zip: NORTH OLDTOWN FM 99059
Social Security #: 999-76-4778 Date of Birth: 10/14/1980
Phone Number: (555) 555-6820 Do you have a driver's license? 2
Driver's Lic. #: Driver's License State:
Citizenship Status: 2 Alien Registration Number: A999428574
Marital Status: 2 Date married, separate... divorced, or widowed:
Enrollment Status for Summer Term 2000: 5
Enrollment Status for Fall semester/qtr. 2000: 5
Enrollment Status for Winter quarter 2000-2001: 1
Enrollment Status for Spring semester/qtr. 2001: 1
Enrollment Status for Summer Term 2001: 1
Father's Grade Level Completed:
Mother's Grade Level Completed:
State of Legal Residence: FM Legal Resident before 1-1-1995? 1
Date of Legal Residence: 10/1995 Drug Conviction Eligibility? 1
Are you male? 2 Selective Service Registration? ☐
Degree/Certificate: 2 Grade level during the 2000-2001 school year: 3
High School Diploma / GED Received 2

OMB Number: 1845-0008
First bachelor's degree before July 1, 2000? 2
Interested in Student Loans? 2
Interested in "work-study"? 2

Step Two: You (the student/spouse) Income and Assets

1999 U.S. income tax return status: 1
1999 U.S. income tax figures from: 1
Were you eligible to file a 1040A or 1040EZ?
...ss Income: $89,980
... tax paid: $0
...r of exemptions: 05
...edit: $3,556
...come: $74,700
...come: $16,000
Total from Worksheet A:
Total from Worksheet B:
Cash, savings, and checking accounts: $5,200
Current net worth of investments: $10,000
Current net worth of business: $0
Current net worth of investment farm: $0
Number of months VA benefits received:
Monthly VA benefits: 0

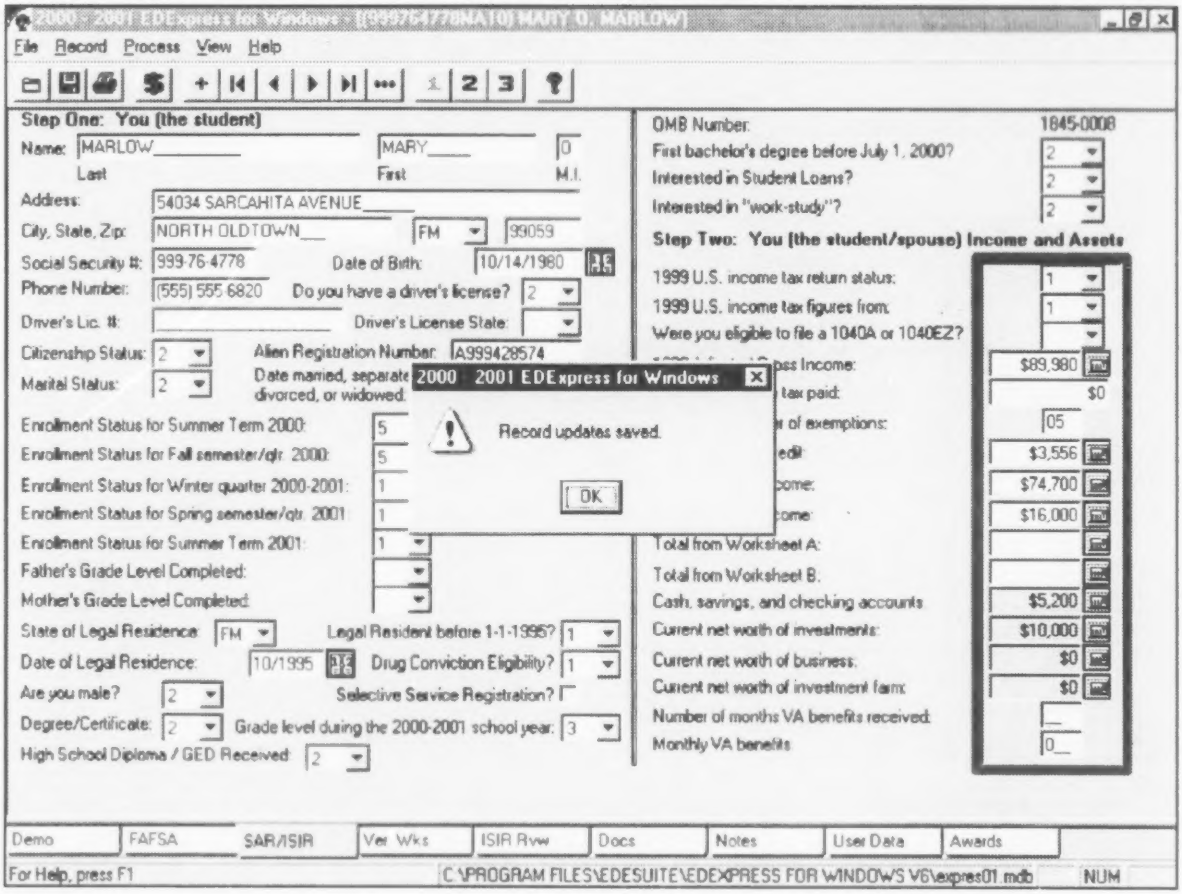
2000 - 2001 EDExpress for Windows

Mark record ready for transmission?

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

A pop-up window displays to indicate that the record updates have been saved.

*Click **OK** to continue.*



2000 - 2001 EDExpress for Windows - [999764778MA10] MARY O. MARLOW]

Step One: You (the student)

Name: MARLOW (Last) MARY (First) O (M.I.)
Address: 54034 SARCAHITA AVENUE
City, State, Zip: NORTH OLDTOWN FM 99059
Social Security #: 999-76-4778
Date of Birth: 10/14/1980
Phone Number: (555) 555-6820
Do you have a driver's license? 2
Driver's Lic. #:
Driver's License State:
Citizenship Status: 2
Alien Registration Number: A999428574
Marital Status: 2
Date married, separate divorced, or widowed:
Enrollment Status for Summer Term 2000: 5
Enrollment Status for Fall semester/qtr. 2000: 5
Enrollment Status for Winter quarter 2000-2001: 1
Enrollment Status for Spring semester/qtr. 2001: 1
Enrollment Status for Summer Term 2001: 1
Father's Grade Level Completed:
Mother's Grade Level Completed:
State of Legal Residence: FM
Legal Resident before 1-1-1995? 1
Date of Legal Residence: 10/1995
Drug Conviction Eligibility? 1
Are you male? 2
Selective Service Registration? ☐
Degree/Certificate: 2
Grade level during the 2000-2001 school year: 3
High School Diploma / GED Received: 2

OMB Number: 1845-0008
First bachelor's degree before July 1, 2000? 2
Interested in Student Loans? 2
Interested in "work-study"? 2

Step Two: You (the student/spouse) Income and Assets

1999 U.S. income tax return status: 1
1999 U.S. income tax figures from: 1
Were you eligible to file a 1040A or 1040EZ?
ss Income: $89,980
tax paid: $0
r of exemptions: 05
edit: $3,556
come: $74,700
come: $16,000
Total from Worksheet A:
Total from Worksheet B:
Cash, savings, and checking accounts: $5,200
Current net worth of investments: $10,000
Current net worth of business: $0
Current net worth of investment farm: $0
Number of months VA benefits received:
Monthly VA benefits: 0

2000 - 2001 EDExpress for Windows

Record updates saved.

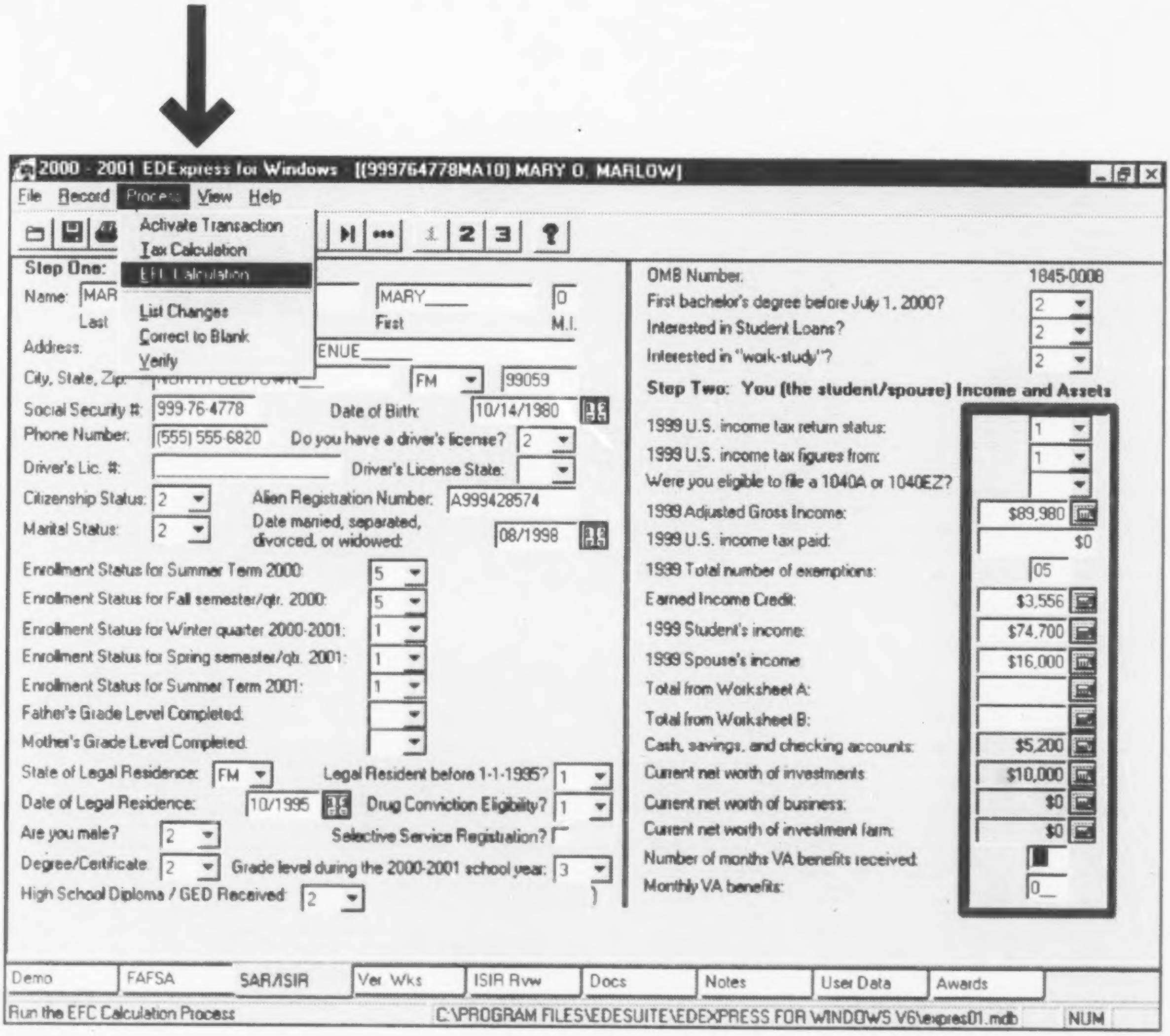
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

BEST COPY AVAILABLE

Select ***Process/EFC Calculation*** *from the menu*

Now that you have supplied the necessary data, you can calculate an estimated EFC.

☝ *Reminder: This EFC is unofficial and should not be used as a basis for payment.*

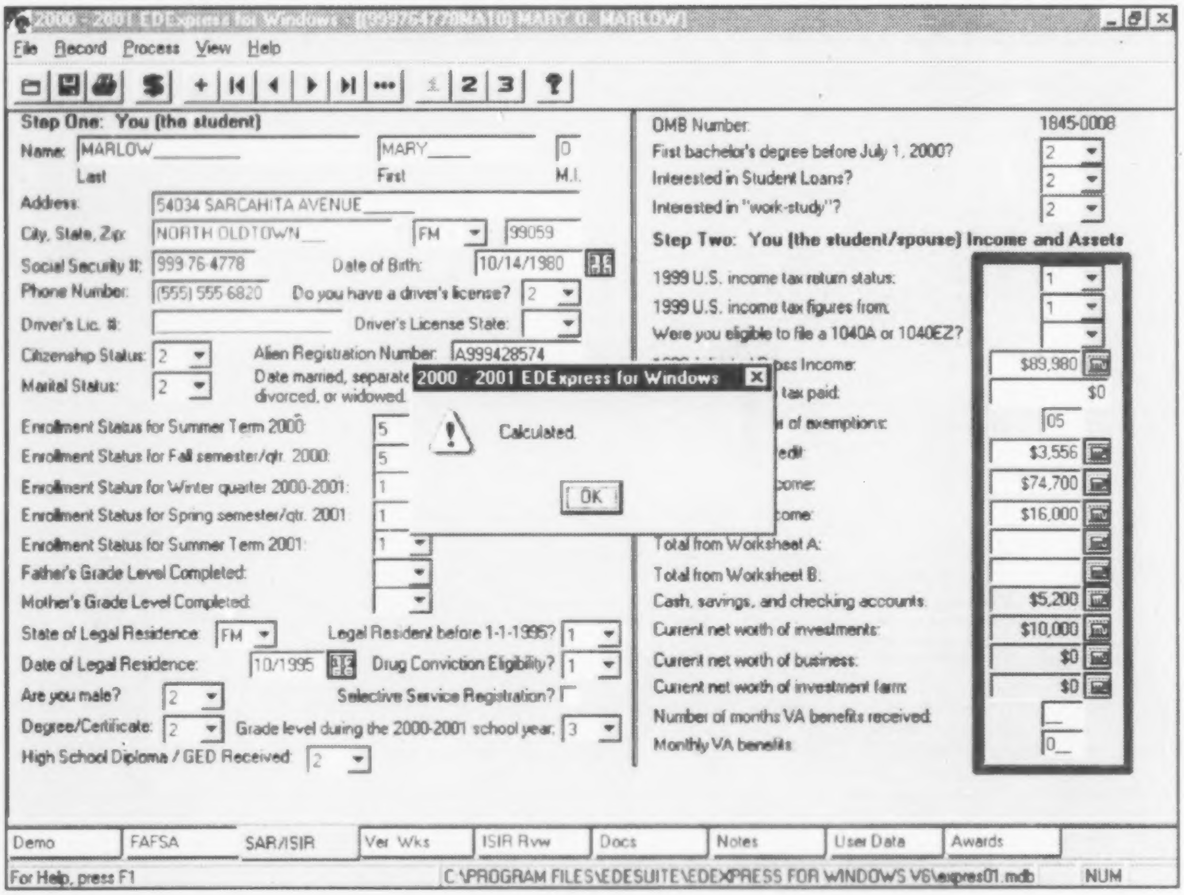

2000 - 2001 EDExpress for Windows [(999764778MA10) MARY O. MARLOW]
File
Record
Process
View
Help
Activate Transaction
Tax Calculation
EFC Calculation
List Changes
Correct to Blank
Verify
2
3
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards
Run the EFC Calculation Process
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Step One:
Name: MAR
Last
MARY
First
M.I.: O
Address: ENUE
City, State, Zip: FM 99059
Social Security #: 999-76-4778
Date of Birth: 10/14/1980
Phone Number: (555) 555-6820
Do you have a driver's license? 2
Driver's Lic. #:
Driver's License State:
Citizenship Status: 2
Alien Registration Number: A999428574
Marital Status: 2
Date married, separated, divorced, or widowed: 08/1998
Enrollment Status for Summer Term 2000: 5
Enrollment Status for Fall semester/qtr. 2000: 5
Enrollment Status for Winter quarter 2000-2001: 1
Enrollment Status for Spring semester/qtr. 2001: 1
Enrollment Status for Summer Term 2001: 1
Father's Grade Level Completed:
Mother's Grade Level Completed:
State of Legal Residence: FM
Legal Resident before 1-1-1995? 1
Date of Legal Residence: 10/1995
Drug Conviction Eligibility? 1
Are you male? 2
Selective Service Registration? ☐
Degree/Certificate: 2
Grade level during the 2000-2001 school year: 3
High School Diploma / GED Received: 2

OMB Number: 1845-0008
First bachelor's degree before July 1, 2000? 2
Interested in Student Loans? 2
Interested in "work-study"? 2

Step Two: You (the student/spouse) Income and Assets
1999 U.S. income tax return status: 1
1999 U.S. income tax figures from: 1
Were you eligible to file a 1040A or 1040EZ?
1999 Adjusted Gross Income: $89,980
1999 U.S. income tax paid: $0
1999 Total number of exemptions: 05
Earned Income Credit: $3,556
1999 Student's income: $74,700
1999 Spouse's income: $16,000
Total from Worksheet A:
Total from Worksheet B:
Cash, savings, and checking accounts: $5,200
Current net worth of investments: $10,000
Current net worth of business: $0
Current net worth of investment farm: $0
Number of months VA benefits received:
Monthly VA benefits: 0

*Click **OK** to see the results*


2000 - 2001 EDExpress for Windows - [(999764778MA10) MARY O. MARLOW]
File Record Process View Help
2 3
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards
NUM

Step One: You (the student)

Name: MARLOW (Last) MARY (First) O (M.I.)
Address: 54034 SARCAHITA AVENUE
City, State, Zip: NORTH OLDTOWN FM 99059
Social Security #: 999-76-4778 Date of Birth: 10/14/1980
Phone Number: (555) 555-6820 Do you have a driver's license? 2
Driver's Lic. #: Driver's License State:
Citizenship Status: 2 Alien Registration Number: A999428574
Marital Status: 2 Date married, separated, divorced, or widowed:
Enrollment Status for Summer Term 2000: 5
Enrollment Status for Fall semester/qtr. 2000: 5
Enrollment Status for Winter quarter 2000-2001: 1
Enrollment Status for Spring semester/qtr. 2001: 1
Enrollment Status for Summer Term 2001: 1
Father's Grade Level Completed:
Mother's Grade Level Completed:
State of Legal Residence: FM Legal Resident before 1-1-1995? 1
Date of Legal Residence: 10/1995 Drug Conviction Eligibility? 1
Are you male? 2 Selective Service Registration? ☐
Degree/Certificate: 2 Grade level during the 2000-2001 school year: 3
High School Diploma / GED Received: 2

OMB Number: 1845-0008
First bachelor's degree before July 1, 2000? 2
Interested in Student Loans? 2
Interested in "work-study"? 2

Step Two: You (the student/spouse) Income and Assets

1999 U.S. income tax return status: 1
1999 U.S. income tax figures from: 1
Were you eligible to file a 1040A or 1040EZ?
ss Income: $89,980
tax paid: $0
of exemptions: 05
edit: $3,556
come: $74,700
come: $16,000
Total from Worksheet A:
Total from Worksheet B:
Cash, savings, and checking accounts: $5,200
Current net worth of investments: $10,000
Current net worth of business: $0
Current net worth of investment farm: $0
Number of months VA benefits received:
Monthly VA benefits: 0

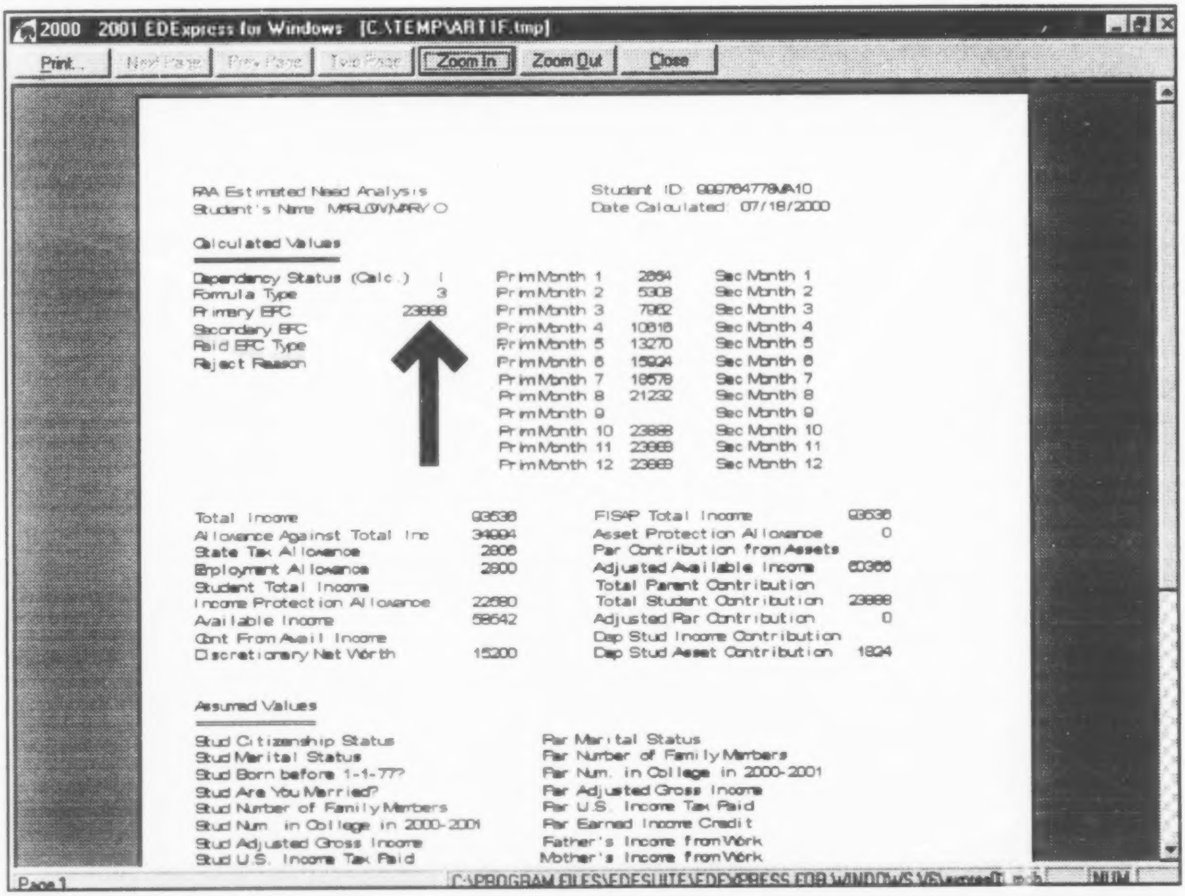
2000 - 2001 EDExpress for Windows
Calculated.
OK

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

*Click **Close** to close the report.*

*Select **File, Close** to close the student record.*

The Estimated Need Analysis results are displayed.



```
FAA Estimated Need Analysis                  Student ID: 999764778MA10
Student's Name  MARLOW,MARY O                Date Calculated: 07/18/2000

Calculated Values

Dependency Status (Calc.)    I      PrimMonth 1    2864    Sec Month 1
Formula Type                 3      PrimMonth 2    5308    Sec Month 2
Primary EFC              23888      PrimMonth 3    7962    Sec Month 3
Secondary EFC                       PrimMonth 4   10618    Sec Month 4
Paid EFC Type                       PrimMonth 5   13270    Sec Month 5
Reject Reason                       PrimMonth 6   15924    Sec Month 6
                                    PrimMonth 7   18578    Sec Month 7
                                    PrimMonth 8   21232    Sec Month 8
                                    PrimMonth 9            Sec Month 9
                                    PrimMonth 10  23888    Sec Month 10
                                    PrimMonth 11  23888    Sec Month 11
                                    PrimMonth 12  23888    Sec Month 12

Total Income                     93638    FISAP Total Income               93638
Allowance Against Total Inc      34994    Asset Protection Allowance           0
State Tax Allowance               2808    Par Contribution from Assets
Employment Allowance              2800    Adjusted Available Income        60366
Student Total Income                      Total Parent Contribution
Income Protection Allowance      22580    Total Student Contribution       23888
Available Income                 58642    Adjusted Par Contribution            0
Cont From Avail Income                    Dep Stud Income Contribution
Discretionary Net Worth          15200    Dep Stud Asset Contribution       1824

Assumed Values

Stud Citizenship Status                  Par Marital Status
Stud Marital Status                      Par Number of Family Members
Stud Born before 1-1-77?                 Par Num. in College in 2000-2001
Stud Are You Married?                    Par Adjusted Gross Income
Stud Number of Family Members            Par U.S. Income Tax Paid
Stud Num. in College in 2000-2001        Par Earned Income Credit
Stud Adjusted Gross Income               Father's Income from Work
Stud U.S. Income Tax Paid                Mother's Income from Work
```

Correcting a Record Using Quick Correction

Quick Correction is designed to be a fast entry for creating corrections when any of the following conditions apply:

- You don't have an ISIR for a particular student on your database.
- You don't want to take the time to open and navigate through the full student record.
- You have many records to correct at one time.
- You need to add your institution code to the record to receive an ISIR.

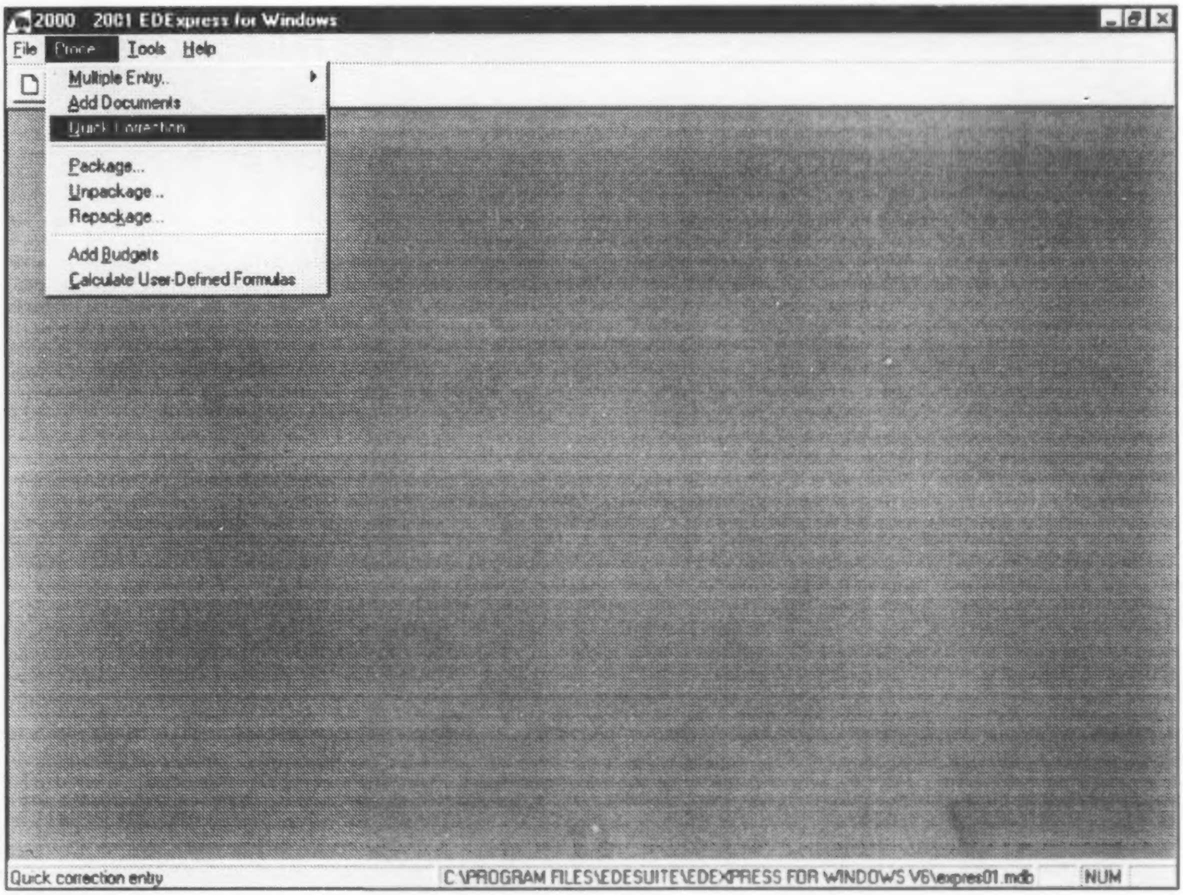
Tip: When using Quick Correction, there are no end of entry edits.

Adding Your Institution Code

Select ***Process/Quick Correction*** *from the menu bar.*

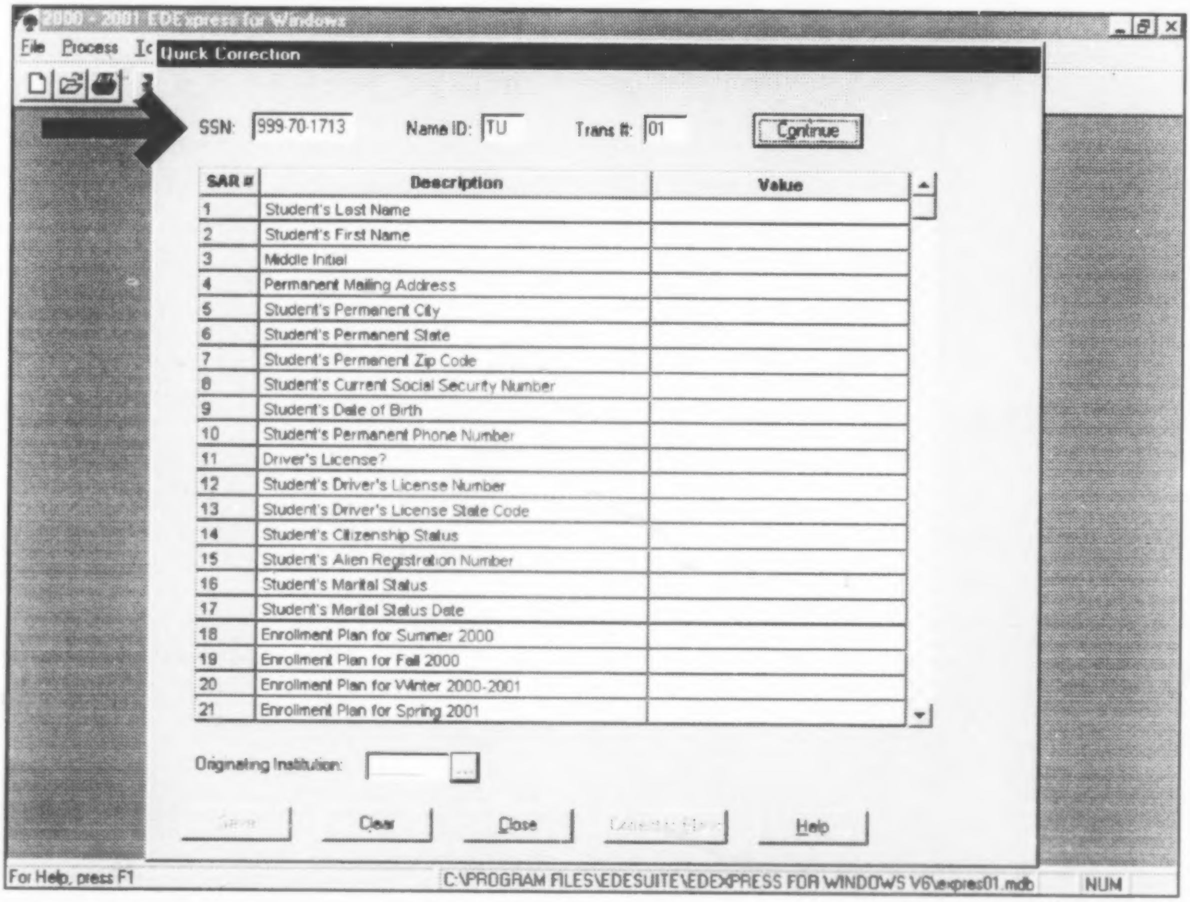
The data release number (DRN) is a four-digit number assigned to all Title IV Federal student aid applicants that appears only on the paper SAR. Electronic corrections to student records cannot be made if your institution has not been designated on the student transaction. However, you can add your institution code through the Quick Correction function. You will need the student's DRN and your institution code.

Note: The student's DRN is a security mechanism. The student has to give it to you before you can add your school to the student's record.


2000 2001 EDExpress for Windows
File
Process
Tools
Help
Multiple Entry..
Add Documents
Quick Correction
Package...
Unpackage..
Repackage..
Add Budgets
Calculate User-Defined Formulas
Quick correction entry
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Enter the student's SSN, Name ID and transaction #.

Click ***Continue***


2000 - 2001 EDExpress for Windows
File
Process
Quick Correction
Continue
Save
Clear
Close
Correct to Match
Help
NUM

SSN: 999-70-1713 Name ID: TU Trans #: 01

SAR #	Description	Value
1	Student's Last Name	
2	Student's First Name	
3	Middle Initial	
4	Permanent Mailing Address	
5	Student's Permanent City	
6	Student's Permanent State	
7	Student's Permanent Zip Code	
8	Student's Current Social Security Number	
9	Student's Date of Birth	
10	Student's Permanent Phone Number	
11	Driver's License?	
12	Student's Driver's License Number	
13	Student's Driver's License State Code	
14	Student's Citizenship Status	
15	Student's Alien Registration Number	
16	Student's Marital Status	
17	Student's Marital Status Date	
18	Enrollment Plan for Summer 2000	
19	Enrollment Plan for Fall 2000	
20	Enrollment Plan for Winter 2000-2001	
21	Enrollment Plan for Spring 2001	

Originating Institution:

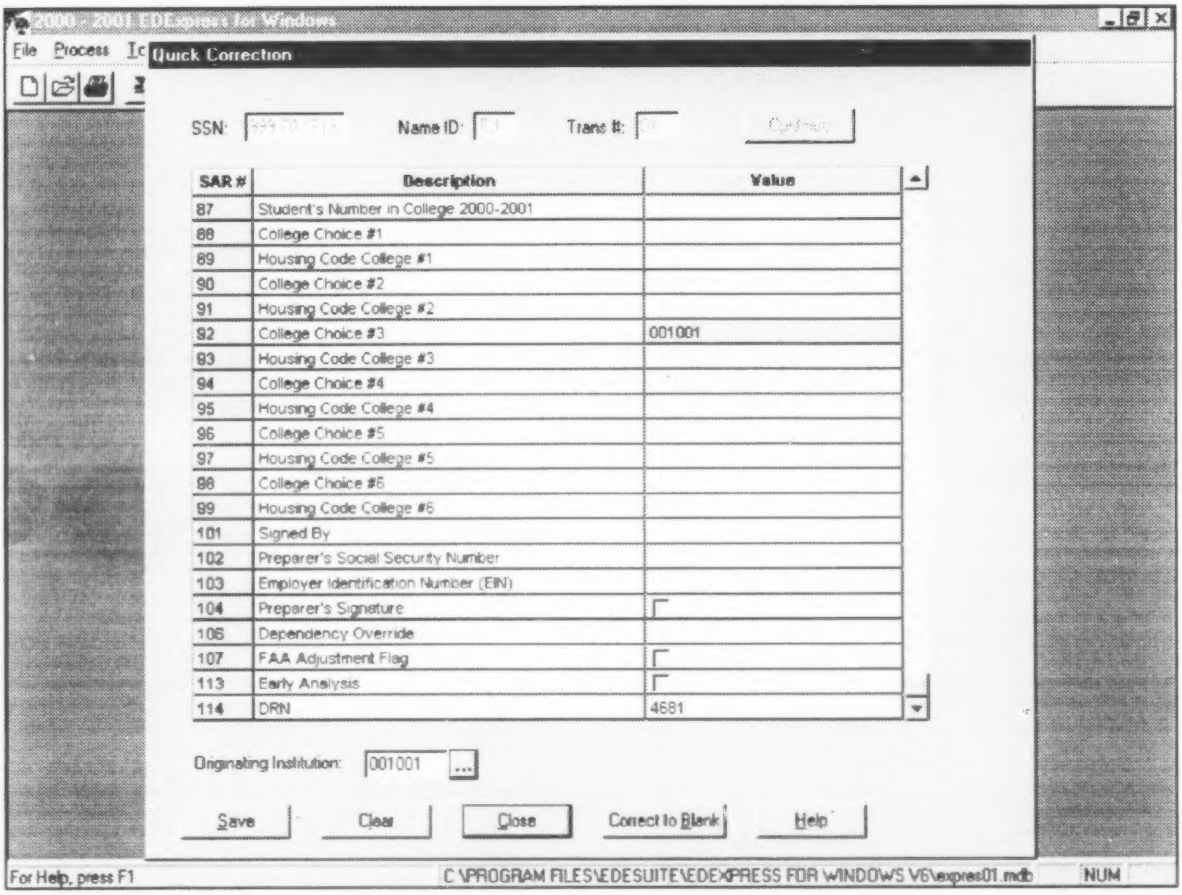
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Enter the institution code on the ***College Choice #3*** *field.*

Enter ***4681*** *in the* ***DRN*** *field. (The student gave you this DRN or gave you the SAR with the DRN on it)*

Note: We are using the college choice # 3 field because college choice fields # 1 and # 2 already have an institution code listed on the student's SAR.


2000 - 2001 EDExpress for Windows
File
Process
Quick Correction
Continue
Save
Clear
Close
Correct to Blank
Help
For Help, press F1
NUM

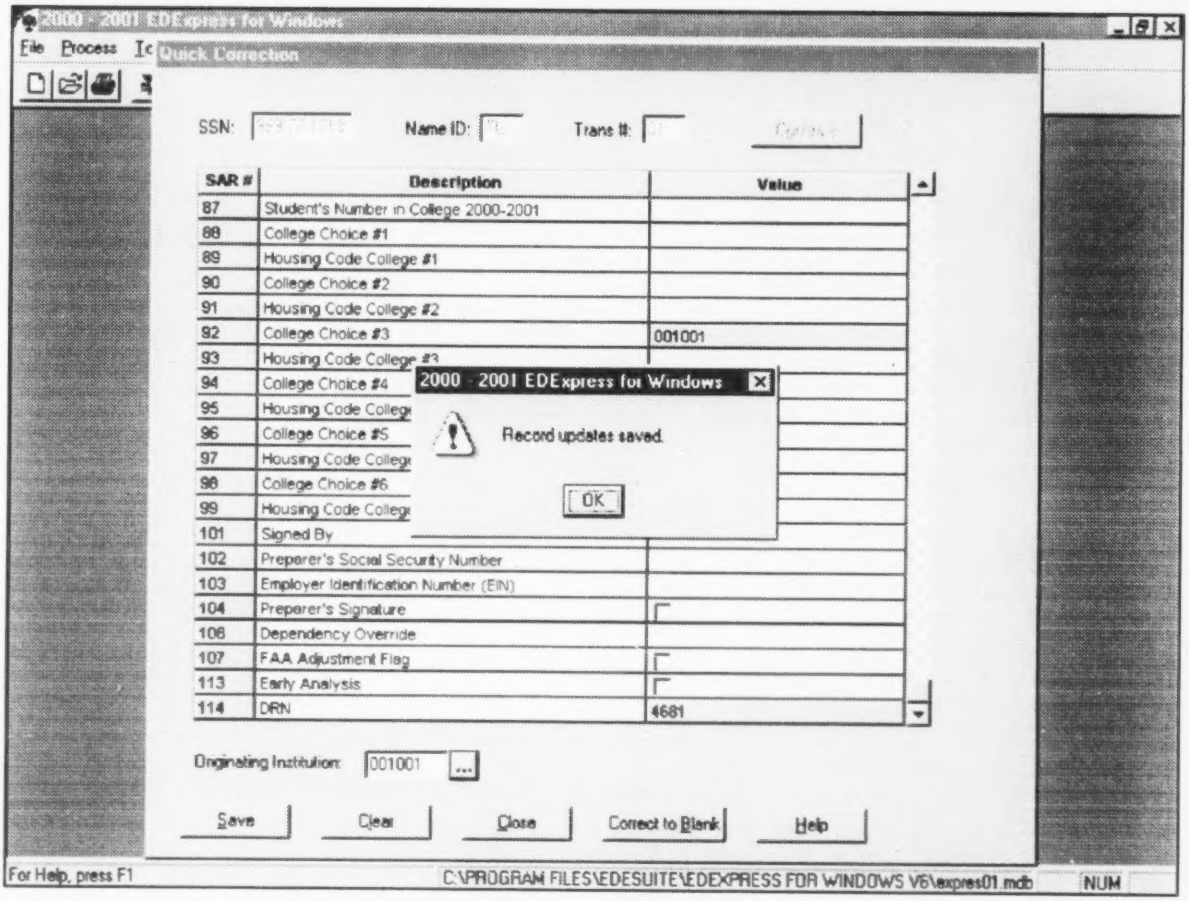
SSN: [illegible] Name ID: [illegible] Trans #: [illegible]

SAR #	Description	Value
87	Student's Number in College 2000-2001	
88	College Choice #1	
89	Housing Code College #1	
90	College Choice #2	
91	Housing Code College #2	
92	College Choice #3	001001
93	Housing Code College #3	
94	College Choice #4	
95	Housing Code College #4	
96	College Choice #5	
97	Housing Code College #5	
98	College Choice #6	
99	Housing Code College #6	
101	Signed By	
102	Preparer's Social Security Number	
103	Employer Identification Number (EIN)	
104	Preparer's Signature	☐
106	Dependency Override	
107	FAA Adjustment Flag	☐
113	Early Analysis	☐
114	DRN	4681

Originating Institution: 001001

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

*Click **Save** to save your corrections.*



2000 - 2001 EDExpress for Windows
File
Process
Quick Correction
SSN:
Name ID:
Trans #:

SAR #	Description	Value
87	Student's Number in College 2000-2001	
88	College Choice #1	
89	Housing Code College #1	
90	College Choice #2	
91	Housing Code College #2	
92	College Choice #3	001001
93	Housing Code College #3	
94	College Choice #4	
95	Housing Code College	
96	College Choice #5	
97	Housing Code College	
98	College Choice #6	
99	Housing Code College	
101	Signed By	
102	Preparer's Social Security Number	
103	Employer Identification Number (EIN)	
104	Preparer's Signature	☐
106	Dependency Override	
107	FAA Adjustment Flag	☐
113	Early Analysis	☐
114	DRN	4681

Originating Institution: 001001

2000 - 2001 EDExpress for Windows

Record updates saved.

OK
Save
Clear
Close
Correct to Blank
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

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Using Professional Judgement

The Trans # or Transaction Number is the version of a student's ISIR that you have

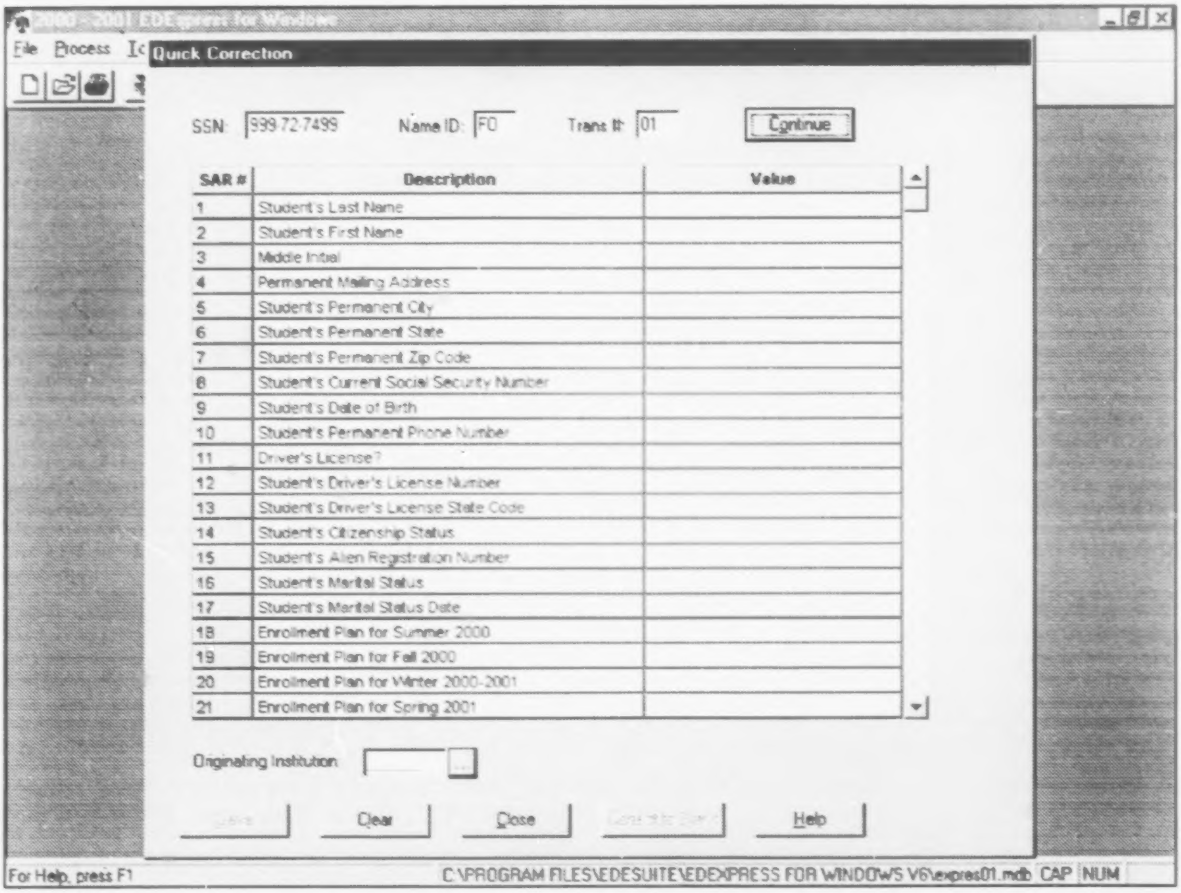
Click ***Continue***

The ID fields are now disabled and not accessible. All the fields are displayed in ISIR order

Scenario

Fiona Follo has submitted a request along with documentation for you to reassess her aid eligibility. You have determined that her adjusted gross income will be changed to $5,890. This correction can easily be made using the Quick Correction method. Since this is a professional judgment, you will need to set the FAA Adjustment Flag in addition to changing the income field.

Type the SSN, Name ID, and Trans # of the record you need to correct.


2000 - 2001 EDExpress for Windows
File
Process
Quick Correction
Continue
Clear
Close
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
CAP
NUM

SSN: 999-72-7499 Name ID: FO Trans #: 01

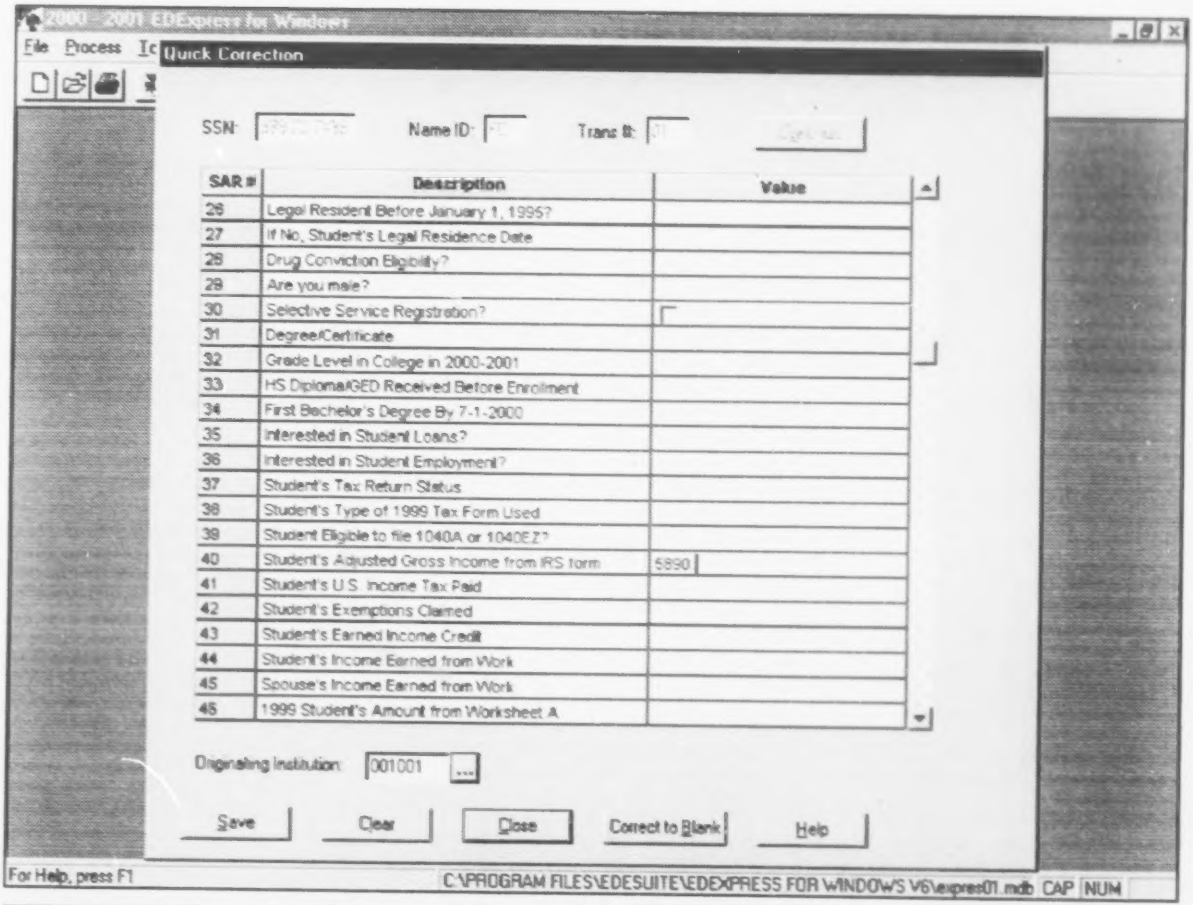
SAR #	Description	Value
1	Student's Last Name	
2	Student's First Name	
3	Middle Initial	
4	Permanent Mailing Address	
5	Student's Permanent City	
6	Student's Permanent State	
7	Student's Permanent Zip Code	
8	Student's Current Social Security Number	
9	Student's Date of Birth	
10	Student's Permanent Phone Number	
11	Driver's License?	
12	Student's Driver's License Number	
13	Student's Driver's License State Code	
14	Student's Citizenship Status	
15	Student's Alien Registration Number	
16	Student's Marital Status	
17	Student's Marital Status Date	
18	Enrollment Plan for Summer 2000	
19	Enrollment Plan for Fall 2000	
20	Enrollment Plan for Winter 2000-2001	
21	Enrollment Plan for Spring 2001	

Originating Institution:

Scroll to the field(s) you need to modify

Click on the value field.

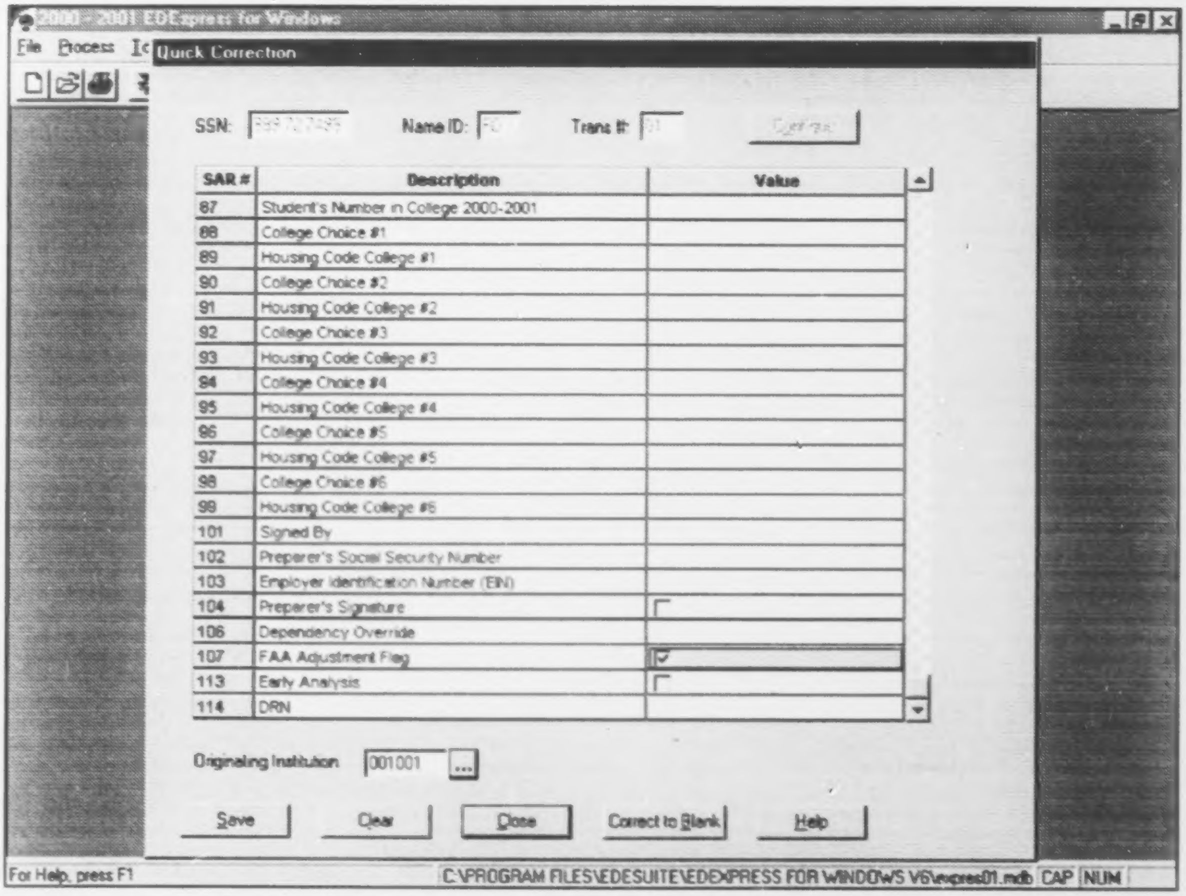
*Type the new value. In this example, type **5,890***


2000 - 2001 EDExpress for Windows
File
Process
Quick Correction
SSN:
Name ID:
Trans #:
Save
Clear
Close
Correct to Blank
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
CAP
NUM

SAR #	Description	Value
26	Legal Resident Before January 1, 1995?	
27	If No, Student's Legal Residence Date	
28	Drug Conviction Eligibility?	
29	Are you male?	
30	Selective Service Registration?	
31	Degree/Certificate	
32	Grade Level in College in 2000-2001	
33	HS Diploma/GED Received Before Enrollment	
34	First Bachelor's Degree By 7-1-2000	
35	Interested in Student Loans?	
36	Interested in Student Employment?	
37	Student's Tax Return Status	
38	Student's Type of 1999 Tax Form Used	
39	Student Eligible to file 1040A or 1040EZ?	
40	Student's Adjusted Gross Income from IRS form	5890
41	Student's U.S. Income Tax Paid	
42	Student's Exemptions Claimed	
43	Student's Earned Income Credit	
44	Student's Income Earned from Work	
45	Spouse's Income Earned from Work	
46	1999 Student's Amount from Worksheet A	

Originating Institution: 001001

Use the scroll bar to locate the FAA Adjustment flag field. Click on the box in the field to indicate to the CPS that the corrections are based on professional judgement.


2000 - 2001 EDExpress for Windows
File
Process
Quick Correction
SSN:
Name ID:
Trans #:
Save
Clear
Close
Correct to Blank
Help

SAR #	Description	Value
87	Student's Number in College 2000-2001	
88	College Choice #1	
89	Housing Code College #1	
90	College Choice #2	
91	Housing Code College #2	
92	College Choice #3	
93	Housing Code College #3	
94	College Choice #4	
95	Housing Code College #4	
96	College Choice #5	
97	Housing Code College #5	
98	College Choice #6	
99	Housing Code College #6	
101	Signed By	
102	Preparer's Social Security Number	
103	Employer Identification Number (EIN)	
104	Preparer's Signature	☐
106	Dependency Override	
107	FAA Adjustment Flag	☑
113	Early Analysis	☐
114	DRN	

Originating Institution: 001001

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb CAP NUM

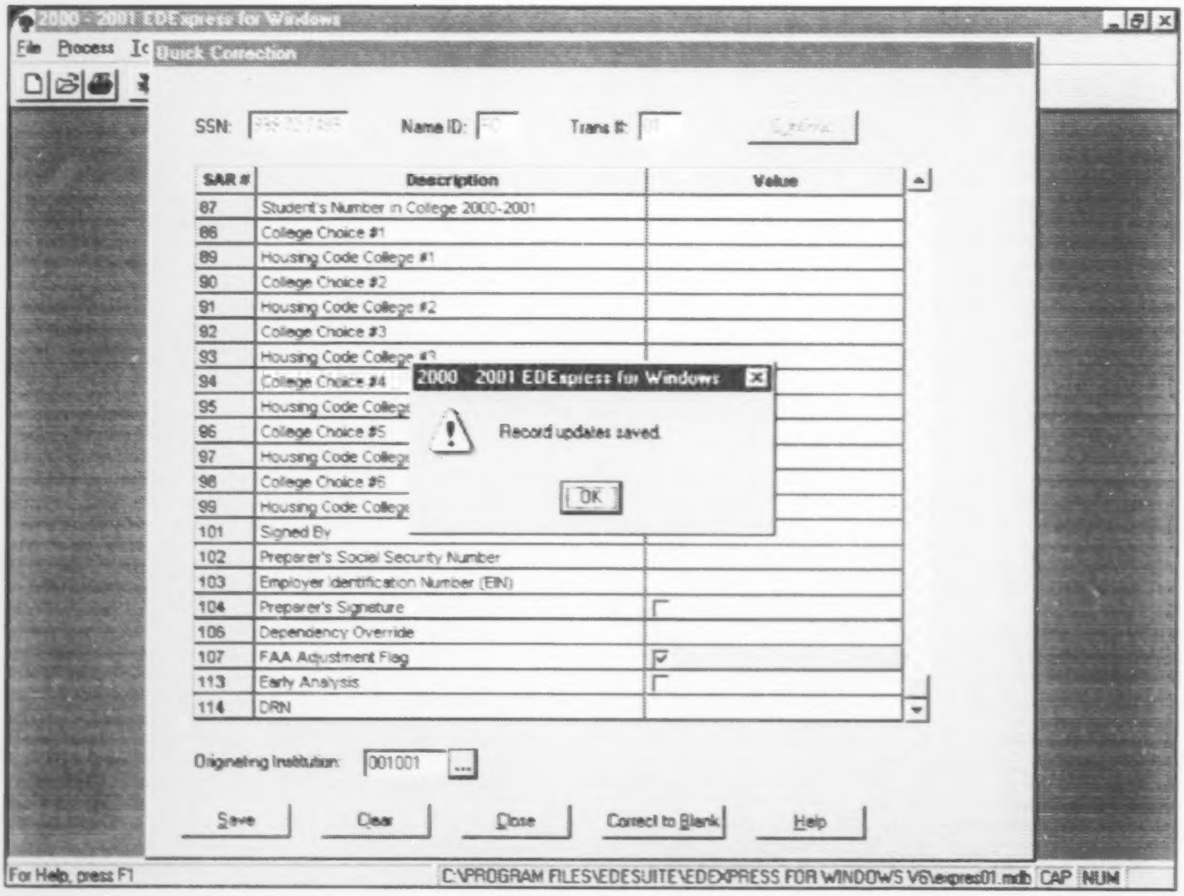
Verify the school code for this correction record.

Note: The Originating Institution field will default to the assumed institution that is currently set. You can change it here if you have multiple Federal School codes.

*Click **Save**.*

*Click **OK** to continue.*

The ID boxes are cleared for you to enter the next record. When finished, click Close to leave the box.



SAR #	Description	Value
87	Student's Number in College 2000-2001	
88	College Choice #1	
89	Housing Code College #1	
90	College Choice #2	
91	Housing Code College #2	
92	College Choice #3	
93	Housing Code College #3	
94	College Choice #4	
95	Housing Code Colleg	
96	College Choice #5	
97	Housing Code Colleg	
98	College Choice #6	
99	Housing Code Colleg	
101	Signed By	
102	Preparer's Social Security Number	
103	Employer Identification Number (EIN)	
104	Preparer's Signature	☐
106	Dependency Override	
107	FAA Adjustment Flag	☑
113	Early Analysis	☐
114	DRN	

2000 - 2001 EDExpress for Windows

Record updates saved.

Originating Institution: 001001

For Help, press F1

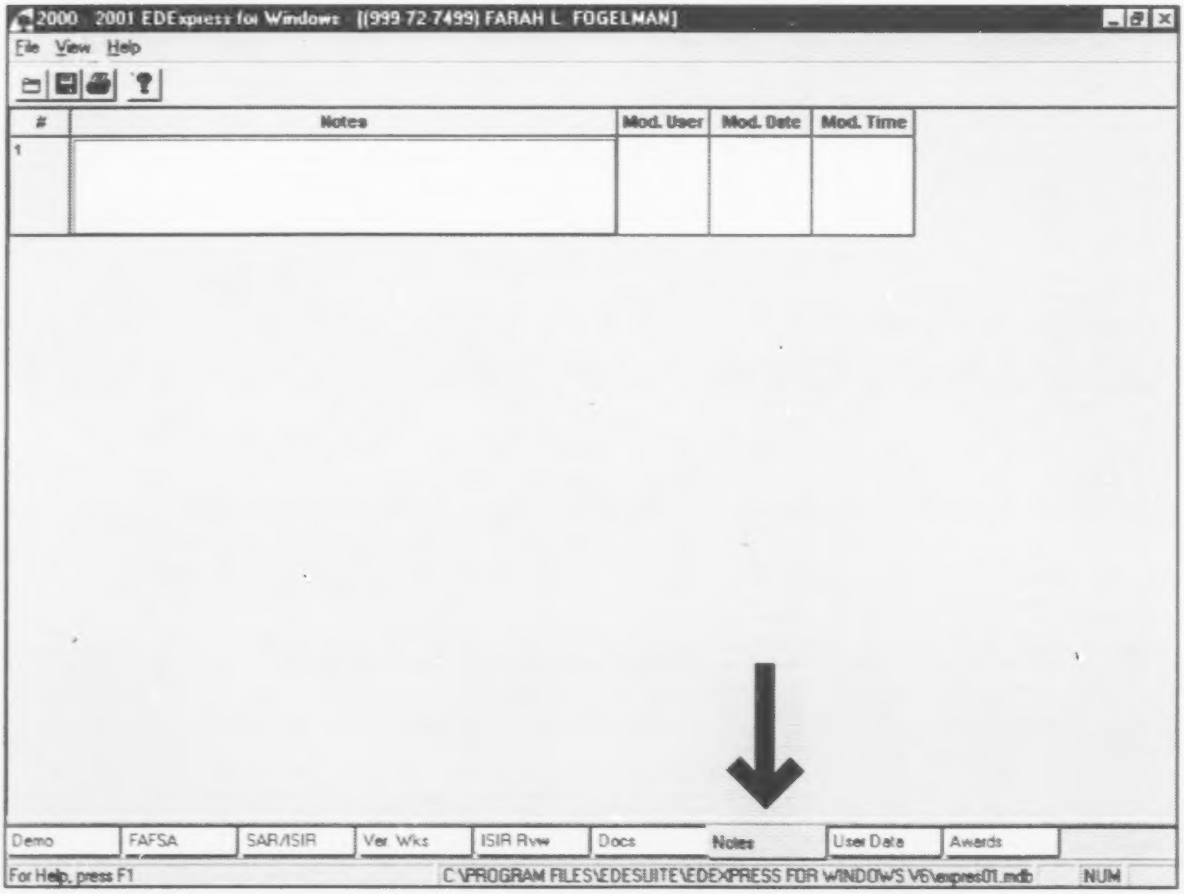
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb CAP NUM

Notes

*Click on the **Notes** tab in the open student record*

Using the Notes tab, you can store electronic notes about the student. For example, if you have made a correction to the student's record based on information provided from a tax return, you should record what you did with that information.

Tip: If you do not have access to this screen, make sure you checked the box in Tools/Setup/Global/System to allow notepad entries to be edited.


File
View
Help
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards
NUM

2000 - 2001 EDExpress for Windows - [(999-72-7499) FARAH L. FOGELMAN]

#	Notes	Mod. User	Mod. Date	Mod. Time
1				

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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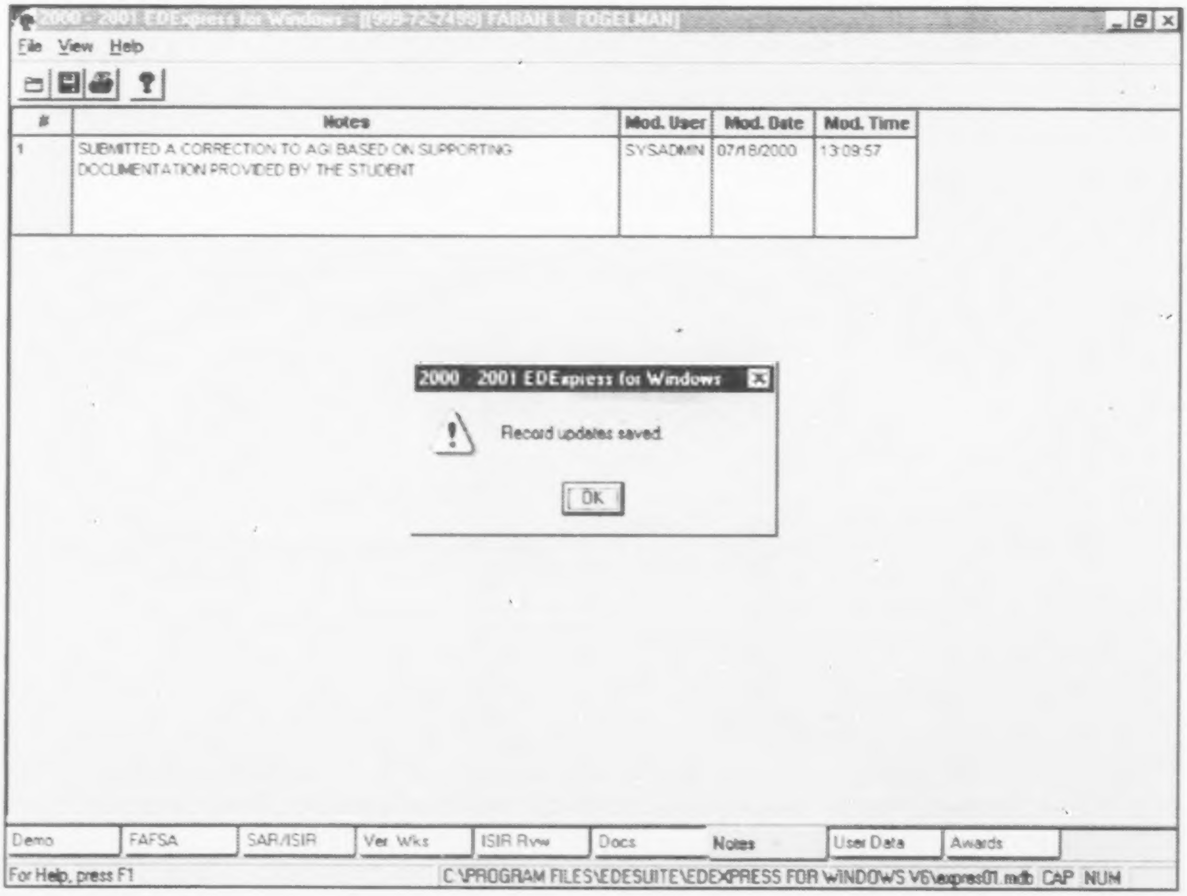
Begin typing your note. The software automatically tracks the user who added the note as well as the date and time it was added.

Continue to add additional notes as needed by pressing the Enter key.

Click the ***Save*** *icon to save your entries.*


2000 - 2001 EDExpress for Windows - [[999-72-7499] FARAH L. FOGELMAN]
File
View
Help
2000 - 2001 EDExpress for Windows
OK
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
CAP
NUM

#	Notes	Mod. User	Mod. Date	Mod. Time
1	SUBMITTED A CORRECTION TO AGI BASED ON SUPPORTING DOCUMENTATION PROVIDED BY THE STUDENT	SYSADMIN	07/18/2000	13:09:57

Record updates saved.

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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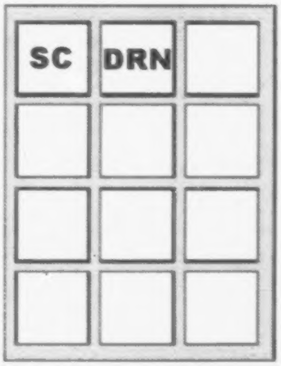
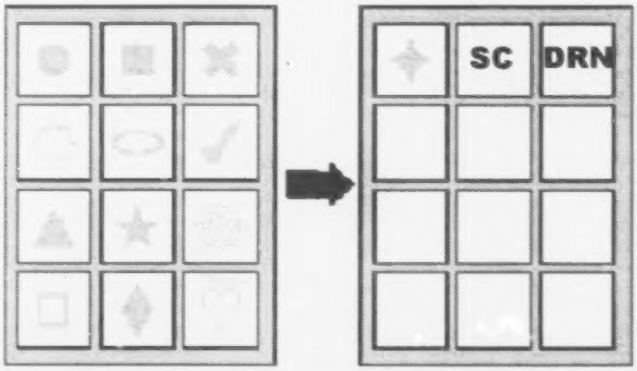
Correction Record Considerations

If you are correcting more than 12 fields on the student record in addition to adding your school code to the ISIR transaction, CPS may not accept your correction. The Institution Code and DRN fields are always listed last in your export files. If you have more than 12 fields in the correction record, the school code and DRN will likely be bumped into the second correction record for that student. CPS will read the first 12 fields and reject the corrections, because the school code and DRN are only included in the second correction record.

To avoid the rejection from CPS, only submit the institution code and DRN on your initial correction. This will ensure CPS receives the necessary fields on a single transaction, and you will receive back a valid ISIR within 72 hours. Make any additional corrections on a new transaction.



Correction records hold 12 fields and the school code and DRN always follow the last field.



If more than 12 fields are changed, the school code and DRN are bumped to the next correction record.

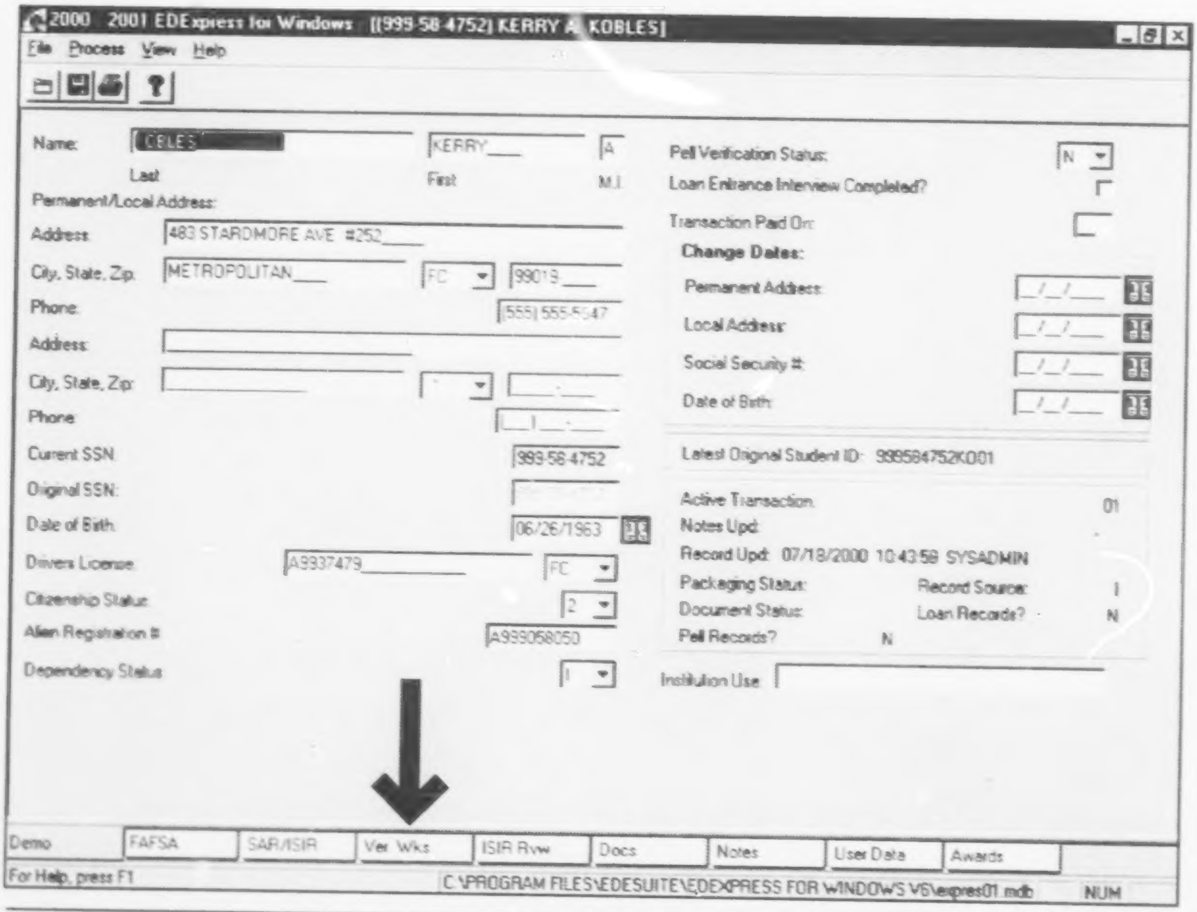
Correcting a Record Using the Verification Worksheet Tab

The Verification Worksheet tab in EDExpress helps you verify and correct inconsistent or illogical tax information on ISIRs selected for verification. You must have the student's ISIR to use this feature.

Tip: For more information on the Verification Worksheet, refer to the Student Aid Handbook.

In this example, the student's record is already open.

Click the ***Ver. Wks*** *tab.*



2000 2001 EDExpress for Windows [(999-58-4752) KERRY A KOBLES]

Name: OBLES (Last) KERRY (First) A (M.I.)

Permanent/Local Address:

Address: 483 STARDMORE AVE #252

City, State, Zip: METROPOLITAN FC 99019

Phone: (555) 555-5547

Address:

City, State, Zip:

Phone:

Current SSN: 999-58-4752

Original SSN:

Date of Birth: 06/26/1963

Drivers License: A9337479 FC

Citizenship Status: 2

Alien Registration #: A999058050

Dependency Status: I

Pell Verification Status: N

Loan Entrance Interview Completed? ☐

Transaction Paid On:

Change Dates:

Permanent Address: __/__/____

Local Address: __/__/____

Social Security #: __/__/____

Date of Birth: __/__/____

Latest Original Student ID: 999584752KO01

Active Transaction: 01

Notes Upd:

Record Upd: 07/18/2000 10:43:58 SYSADMIN

Packaging Status:

Record Source: I

Document Status:

Loan Records? N

Pell Records? N

Institution Use:

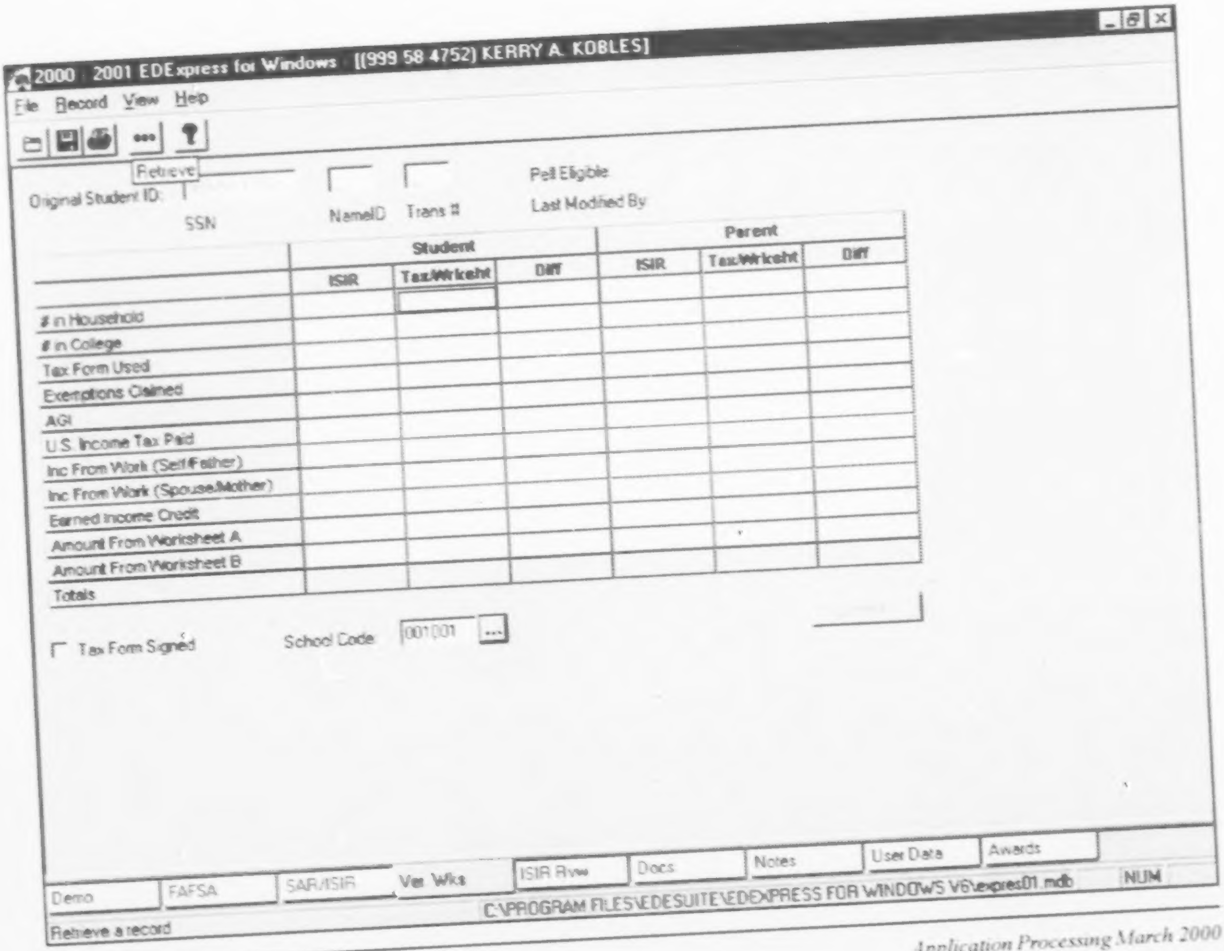
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

You must first retrieve a specific ISIR.

*Click the **Ellipsis** button on the toolbar to select an ISIR for the student.*

EDExpress will enter the information from the student's ISIR transaction that you choose into the ISIR columns on the Verification Worksheet screen. If the student is dependent, information appears in both the student and parent ISIR columns. If the student is independent, information appears only in the student ISIR column unless the student also gave parental information.



2000 - 2001 EDExpress for Windows - [(999 58 4752) KERRY A. KOBLES]

Original Student ID:
SSN
NameID
Trans #
Pell Eligible
Last Modified By

	Student			Parent		
	ISIR	Tax Wrksht	Diff	ISIR	Tax Wrksht	Diff
# in Household						
# in College						
Tax Form Used						
Exemptions Claimed						
AGI						
U.S. Income Tax Paid						
Inc From Work (Self/Father)						
Inc From Work (Spouse/Mother)						
Earned Income Credit						
Amount From Worksheet A						
Amount From Worksheet B						
Totals						

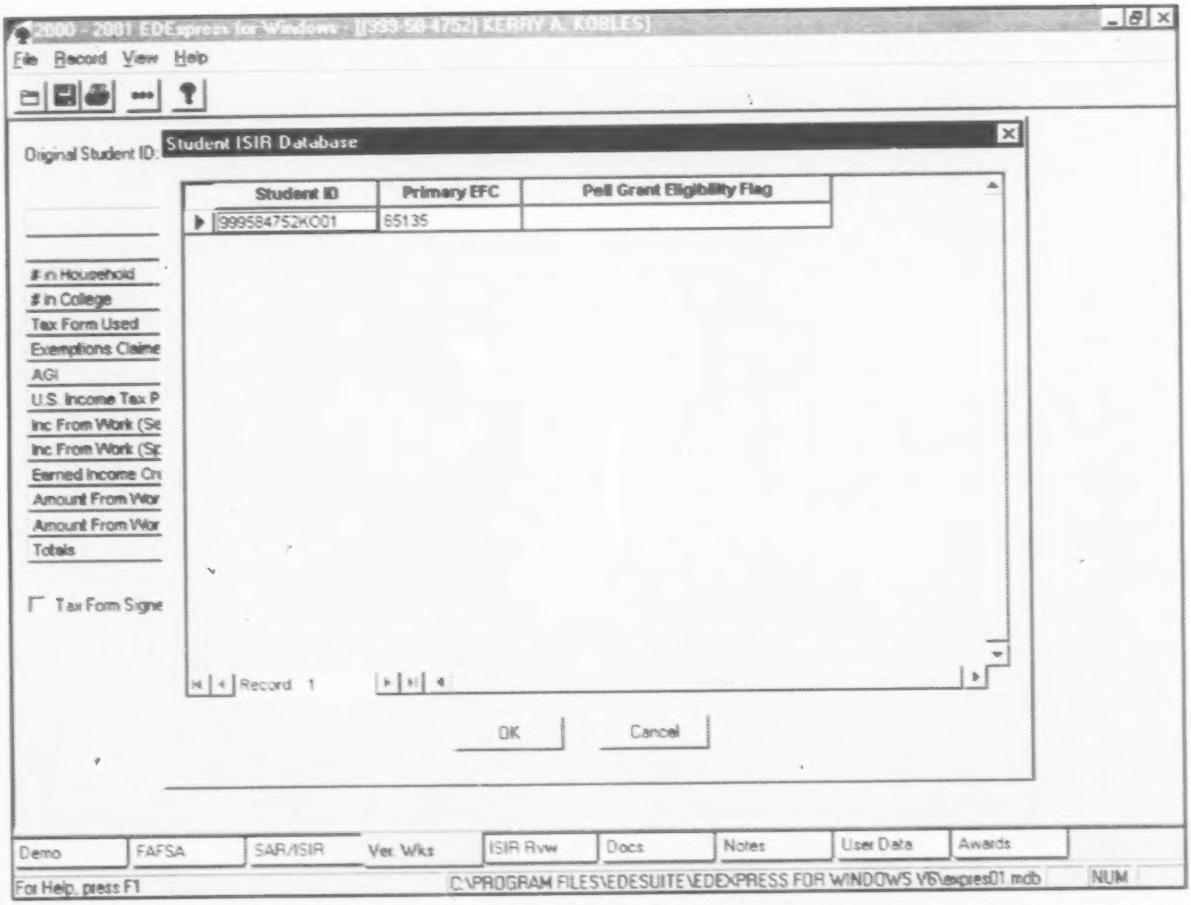
☐ Tax Form Signed

School Code 001001

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Retrieve a record

Click on the ***ISIR*** *to select it, then click* ***OK***


2000 - 2001 EDExpress for Windows - [(999-58-4752) KERRY A. KOBLES]
File
Record
View
Help
Original Student ID:
Student ISIR Database
# in Household
# in College
Tax Form Used
Exemptions Claime
AGI
U.S. Income Tax P
Inc From Work (Se
Inc From Work (Sp
Earned Income Cr
Amount From Wor
Amount From Wor
Totals
Tax Form Signe
Record 1
OK
Cancel
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Student ID	Primary EFC	Pell Grant Eligibility Flag
999584752KO01	65135	

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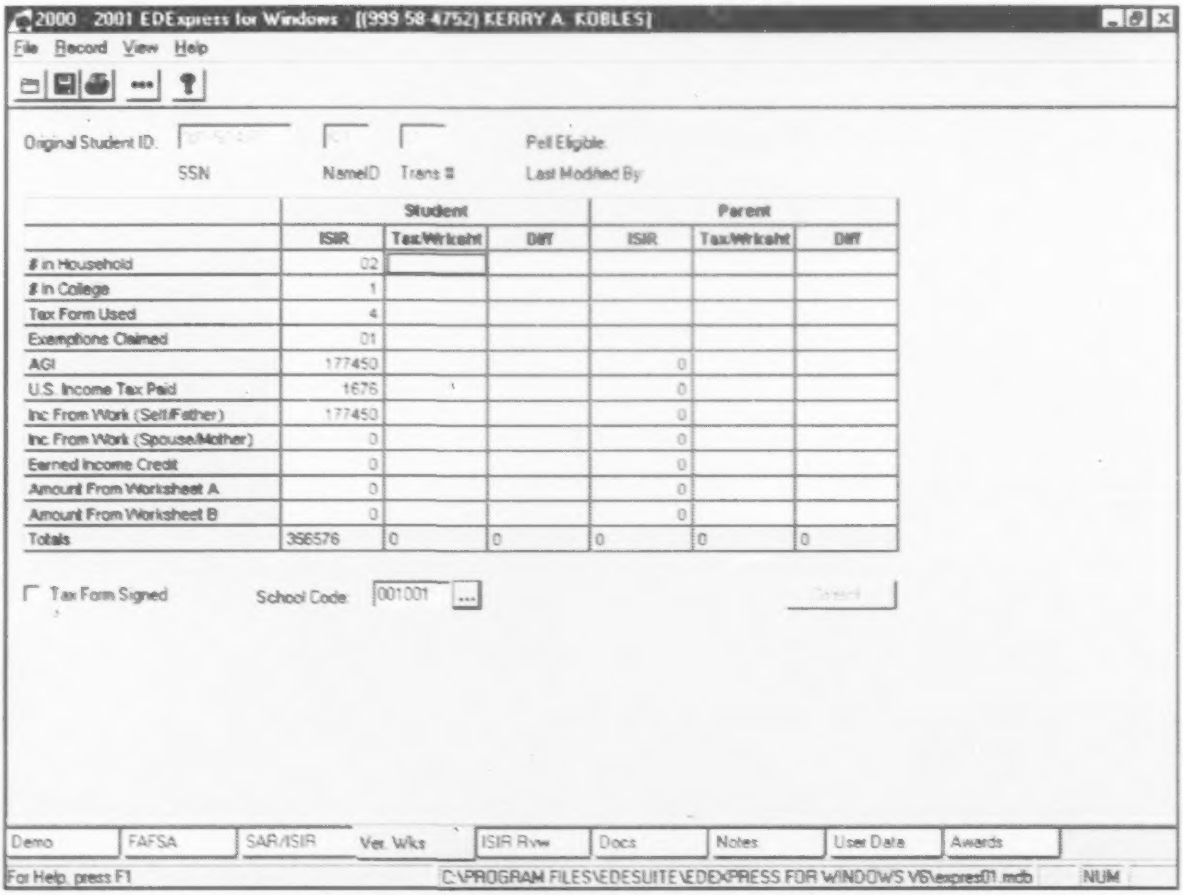
The ISIR data displays in the ISIR column on the worksheet

NEW **A new row added to the verification worksheet displays the total sum of income differences so that the FAA can tell if the differences are within the tolerance level. (The number in the household/college and Exemptions claimed are not included in this total.)**



2000 - 2001 EDExpress for Windows - [(999 58-4752) KERRY A. KOBLES]

Original Student ID: SSN NameID Trans # Pell Eligible: Last Modified By:

	Student			Parent		
	ISIR	Tax/Wrksht	Diff	ISIR	Tax/Wrksht	Diff
# in Household	02					
# in College	1					
Tax Form Used	4					
Exemptions Claimed	01					
AGI	177450			0		
U.S. Income Tax Paid	1676			0		
Inc From Work (Self/Father)	177450			0		
Inc From Work (Spouse/Mother)	0			0		
Earned Income Credit	0			0		
Amount From Worksheet A	0			0		
Amount From Worksheet B	0			0		
Totals	356576	0	0	0	0	0

☐ Tax Form Signed School Code: 001001

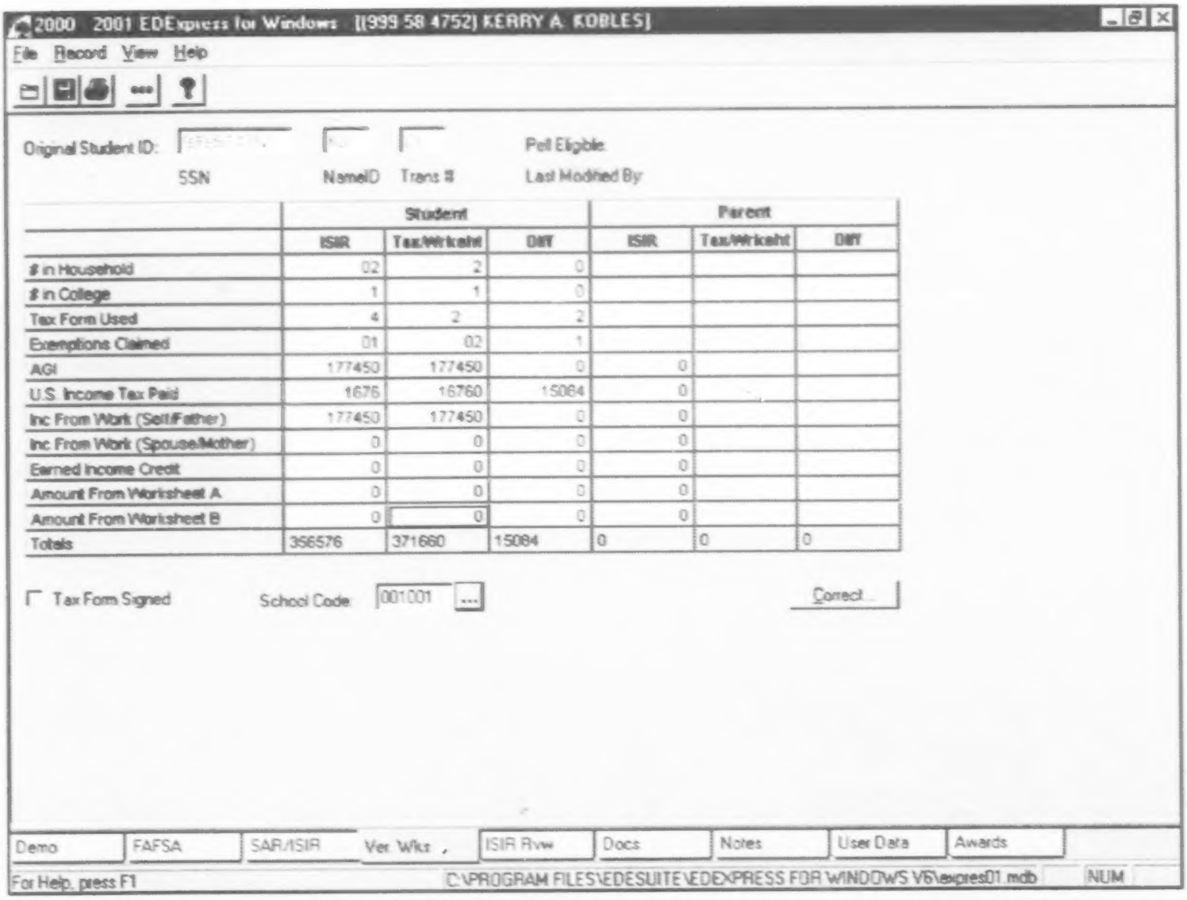
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

When you enter the information in the Tax/Wksht columns, EDExpress compares it to the information on the ISIR and calculates any differences. These calculations are displayed in the Diff. Column.

A new field "Tax Form Used" is included on the Verification Worksheet.

*Next, in the **Tax/Wksht** column, type the verified data from the tax return, verification form, or other documentation.*


2000 2001 EDExpress for Windows [(999 58 4752) KERRY A. KOBLES]
File Record View Help
Demo
FAFSA
SAR/ISIR
Ver. Wks.
ISIR Rvw
Docs
Notes
User Data
Awards
Correct...

Original Student ID:
SSN
NameID
Trans #
Pell Eligible:
Last Modified By:

	Student			Parent		
	ISIR	Tax/Wrksht	Diff	ISIR	Tax/Wrksht	Diff
# in Household	02	2	0			
# in College	1	1	0			
Tax Form Used	4	2	2			
Exemptions Claimed	01	02	1			
AGI	177450	177450	0	0		
U.S. Income Tax Paid	1676	16760	15084	0		
Inc From Work (Self/Father)	177450	177450	0	0		
Inc From Work (Spouse/Mother)	0	0	0	0		
Earned Income Credit	0	0	0	0		
Amount From Worksheet A	0	0	0	0		
Amount From Worksheet B	0	0	0	0		
Totals	356576	371660	15084	0	0	0

☐ Tax Form Signed

School Code: 001001

For Help, press F1

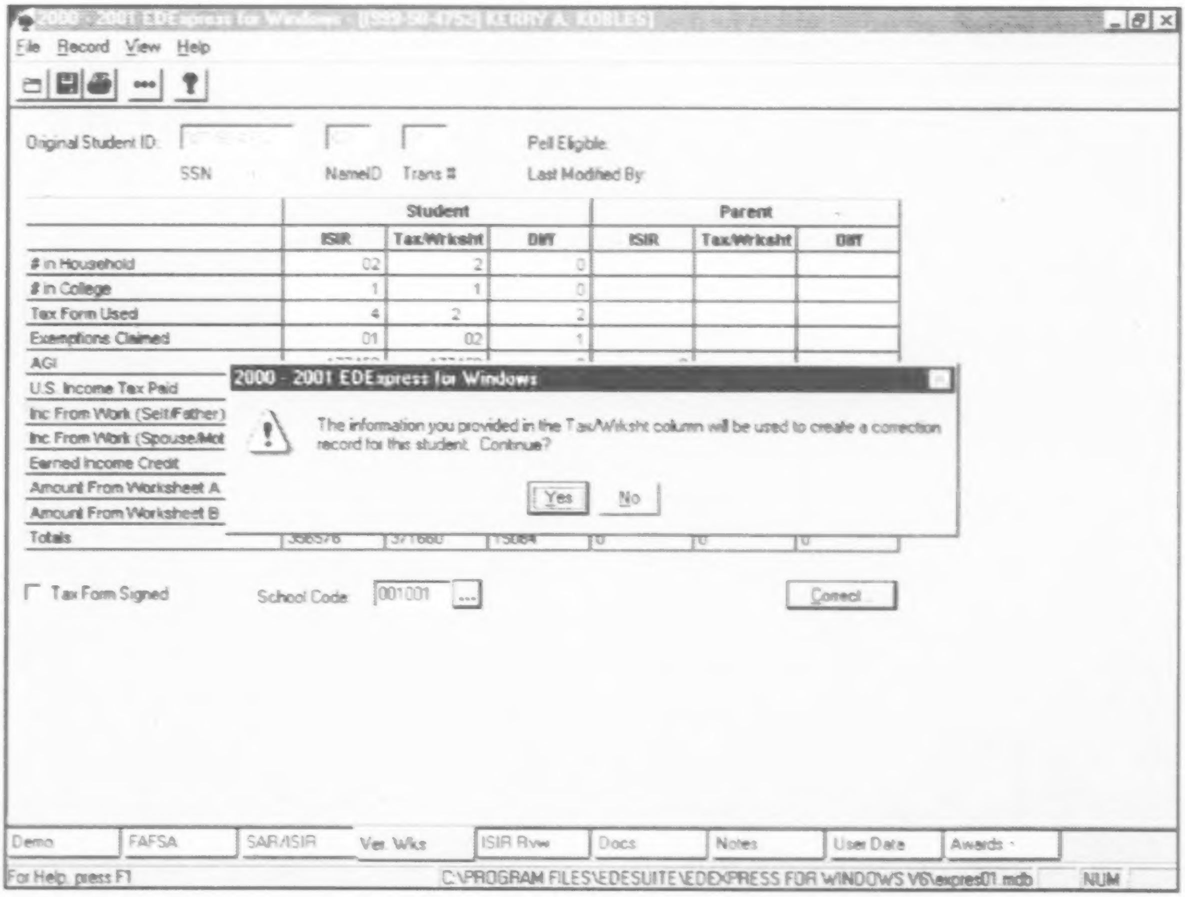
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

Click the button labeled ***Correct***

Click ***Yes*** *to continue*

At this point, you may want to create a correction record based on the information entered.


2000 - 2001 EDExpress for Windows - [(999-50-4752) KERRY A. KOBLES]
File
Record
View
Help
Original Student ID:
SSN
NameID
Trans #
Pell Eligible:
Last Modified By:
☐ Tax Form Signed
School Code:
001001
...
Correct...
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM
2000 - 2001 EDExpress for Windows
Yes
No

	Student			Parent		
	ISIR	Tax/Wrksht	Diff	ISIR	Tax/Wrksht	Diff
# in Household	02	2	0			
# in College	1	1	0			
Tax Form Used	4	2	2			
Exemptions Claimed	01	02	1			
AGI						
U.S. Income Tax Paid						
Inc From Work (Self/Father)						
Inc From Work (Spouse/Mot						
Earned Income Credit						
Amount From Worksheet A						
Amount From Worksheet B						
Totals	356576	371660	15084	0	0	0

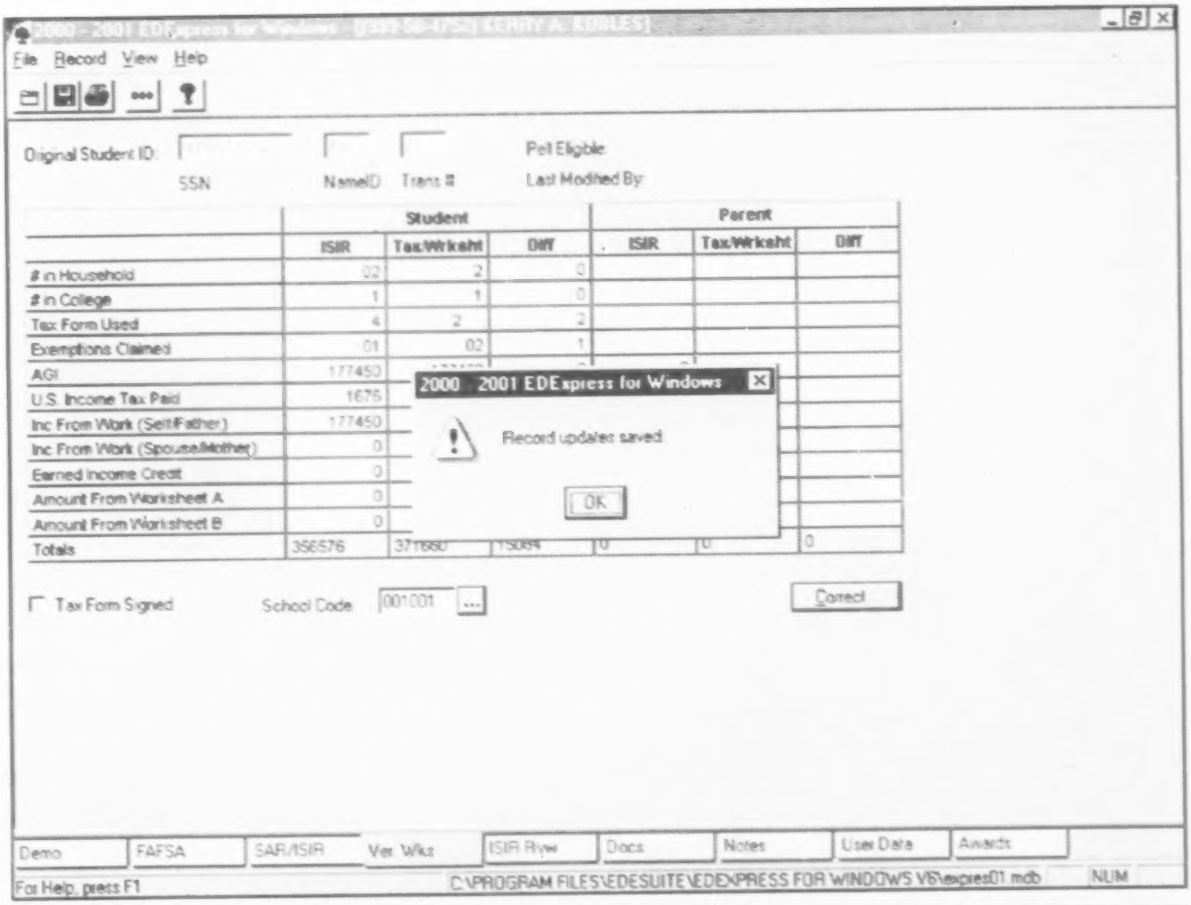
The information you provided in the Tax/Wksht column will be used to create a correction record for this student. Continue?

A pop-up window displays that indicates your record updates were saved.

Click **OK** to continue.

A pop-up window displays to indicate that your corrections were saved.

Click **OK** to continue.


File
Record
View
Help
Original Student ID:
SSN
NameID
Trans #
Pell Eligible
Last Modified By:
2000 2001 EDExpress for Windows
OK
☐ Tax Form Signed
School Code
...
Correct
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

	Student			Parent		
	ISIR	Tax/Wrksht	Diff	ISIR	Tax/Wrksht	Diff
# in Household	02	2	0			
# in College	1	1	0			
Tax Form Used	4	2	2			
Exemptions Claimed	01	02	1			
AGI	177450					
U.S. Income Tax Paid	1676					
Inc From Work (Self/Father)	177450					
Inc From Work (Spouse/Mother)	0					
Earned Income Credit	0					
Amount From Worksheet A	0					
Amount From Worksheet B	0					
Totals	356576	371660	15084	0	0	0

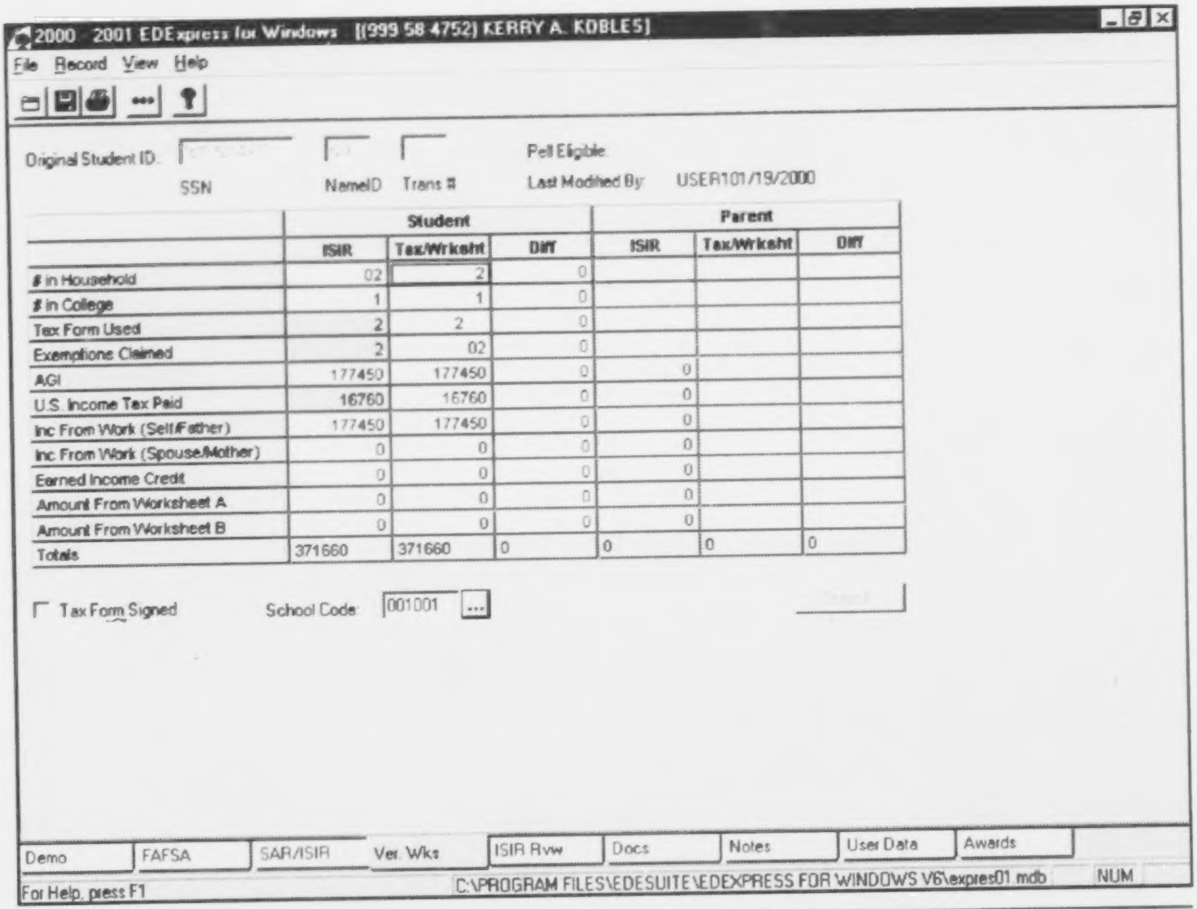
Record updates saved

School Code: 001001

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

After you have made the corrections, you can access the record at any time before you batch the record for transmission. Note that the corrected fields appear in a different color.

After this point, to see the original entries on the transaction you are correcting, you must print the transaction. When you view the corrected transaction on the screen, you see the corrected, not the original, data.



2000 - 2001 EDExpress for Windows [(999 58 4752) KERRY A. KOBLES]

Original Student ID: SSN NameID Trans #

Pell Eligible:

Last Modified By: USER101/19/2000

	Student			Parent		
	ISIR	Tax/Wrksht	Diff	ISIR	Tax/Wrksht	Diff
# in Household	02	2	0			
# in College	1	1	0			
Tax Form Used	2	2	0			
Exemptions Claimed	2	02	0			
AGI	177450	177450	0	0		
U.S. Income Tax Paid	16760	16760	0	0		
Inc From Work (Self/Father)	177450	177450	0	0		
Inc From Work (Spouse/Mother)	0	0	0	0		
Earned Income Credit	0	0	0	0		
Amount From Worksheet A	0	0	0	0		
Amount From Worksheet B	0	0	0	0		
Totals	371660	371660	0	0	0	0

☐ Tax Form Signed

School Code: 001001

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Lesson 1 Exercise

Scenario:

Maria is a Financial Aid Officer at a small college in Wyoming. She is a very "hands-on" FAO and likes to be involved in the technical operation of the office. Today, Maria imported several batches of electronic app and automatic ISIR data. Now she wants to print ISIRs for all of the rejected records.

Exercise Instructions:

The tasks for this exercised are outlined below. You will complete the tasks and answer questions that pertain to those tasks. **Read the tasks AND the questions before you begin the exercise! Answers to some of the questions may be a part of the task or involve a computer response.**

Use the steps outlined below to print multiple ISIRs.

Step	Action
1	Select **File/Print/App Express** from the menu bar. The ISIR Report option is displayed in the Report field.
2	Click on the **Multiple** button to see multiple ISIRs.
3	Click on **Screen** to view the ISIRs on your PC screen.
4	Click on the **Selection Criteria** button to specify which records to print.
5	Click on the **Ellipsis** button next to the Query Title field to retrieve a list of queries.
6	Select the **Rejected Records** query you created in the class exercise to include all rejected records on the database.
7	Click **OK**.
8	Click **Close** to close the View Query screen.
9	Click **OK** to print the ISIRs for the selected group.

1. How many ISIR records were rejected?

2. For Social Security Number __________, what was the error message?

Maria's next task is to make corrections to records using the Quick Correction function of EDExpress.

Lesson 1 Exercise, continued

She will use the following steps to perform the correction:

Step	Action
1	Select **Process/Quick Correction** from the menu bar.
2	Type the SSN: 999-72-7499 Name ID: FO Transaction #: 01 The transaction number is the version of a student's ISIR that you have.
3	Scroll to the field you need to modify. In this example, we need to modify the information in the Student's AGI field.
4	Click on the **Value** field to the right of the Description field.
5	Type the new value: 5890
6	Mark the box in the FAA Adjustment flag field to indicate that the correction is based on professional judgment.
7	Verify the school code for the record.
8	Click on **Save**.
9	Click on **OK**.

Complete a second Quick Correction using the following information:

SSN: 999-70-1713

Name ID: TU

Transaction #: 02

Field to correct: Student's Income Tax Paid

Old value: 1405

New value: 1685

Lesson 1 Exercise, continued

One of the financial aid counselors in Maria's office is asking for help on correcting a record that was selected for verification. Her colleague Daniel wants Maria to walk him through the steps to make the correction. The student in question is Kerry Kobles. Use the steps outlined below to complete the correction using the Verification Worksheet.

Step	Action
1	In the open student record, click on the **Verification Worksheet** (Ver. Wks) tab.
2	Click on the **ellipsis button** on the toolbar to select an ISIR for the student.
3	From the list of ISIRs, select the 01 transaction. The ISIR data displays in the ISIR column on the worksheet.
4	In the **Tax.Wrksht** column, type the verified data from the provided tax return and verification form. EDExpress compares it to the information on the ISIR and calculates any differences. These calculations are displayed in the Diff. Column.
5	Click the **Correct** button.
6	Click **Yes** to continue.
7	Click OK to continue.
8	Click OK to finish.

1. After the correction is made, do you see the corrected information or the original information on the screen?

2. What happens to the field once you have made the correction to that field?

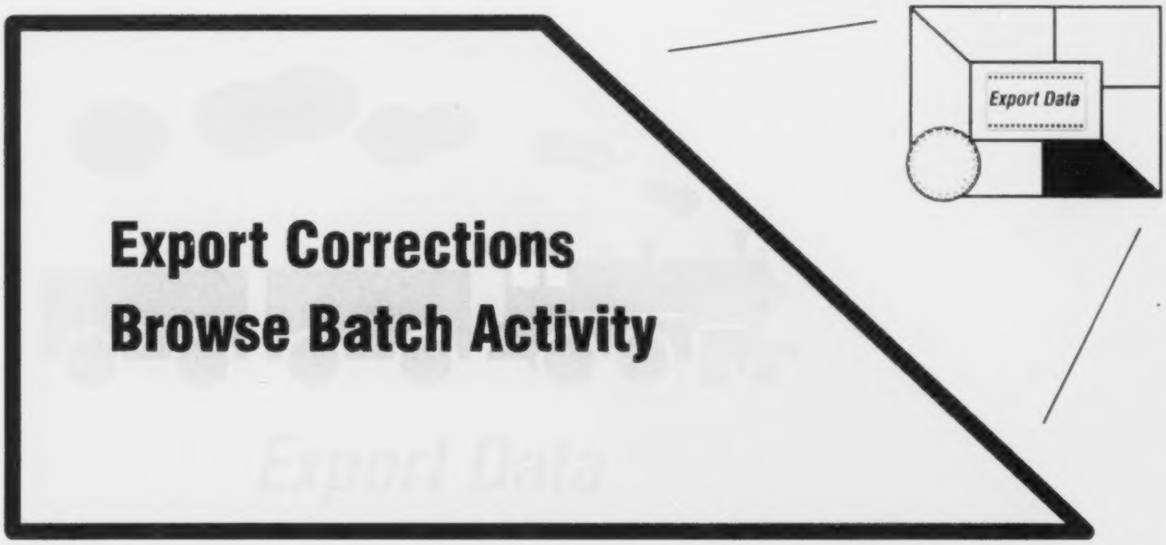
3. Once you've made the correction, can you still access the record prior to batching it for transmisison?

Lesson 2 – Export Data

Objectives

At the end of this lesson you should be able to:

1. Export a batch of corrections.
2. Locate the batch using the Batch Activity Browse.


Export Corrections
Browse Batch Activity
Export Data

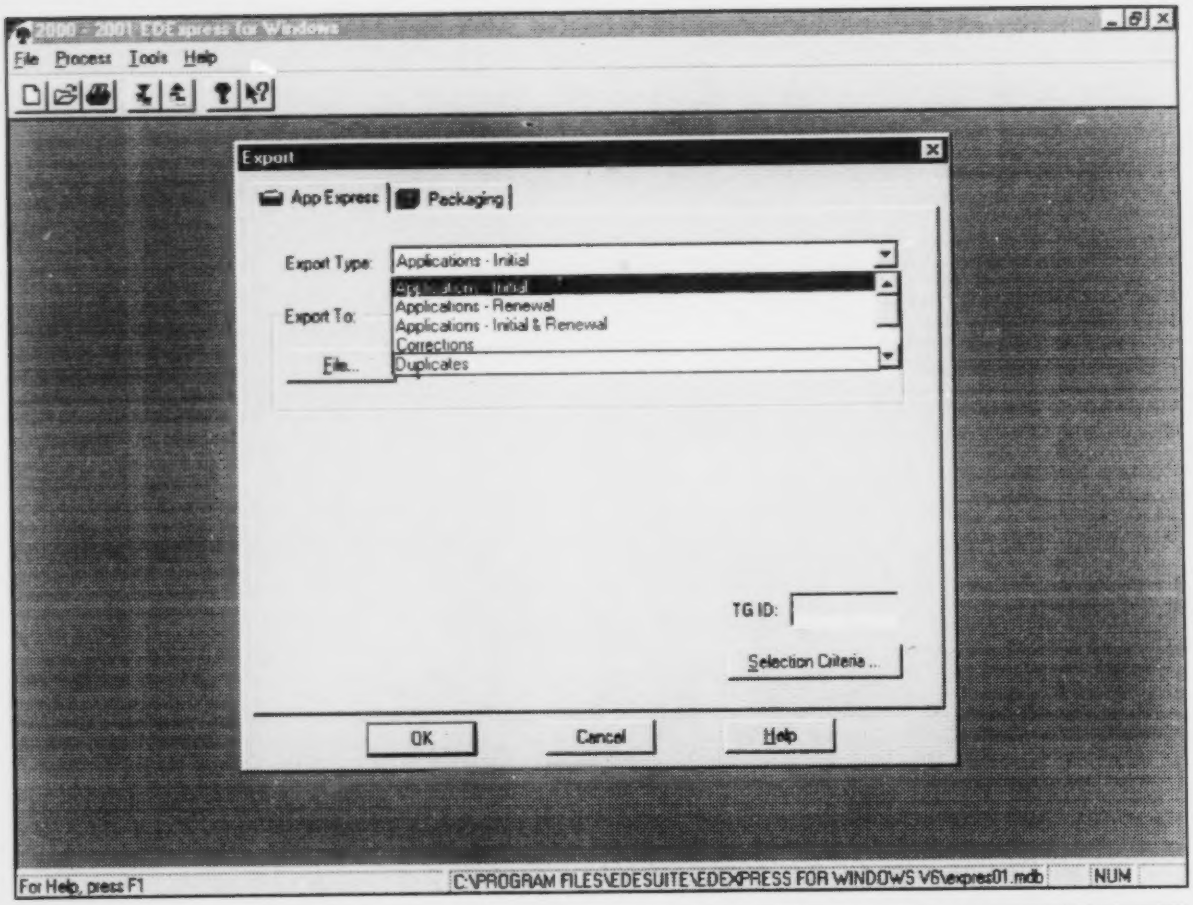
Exporting Corrections

It is now time to send your corrections to the CPS. The first step is to export the records just as you did with the initial applications.

*Select **File/Export** from the main menu.*

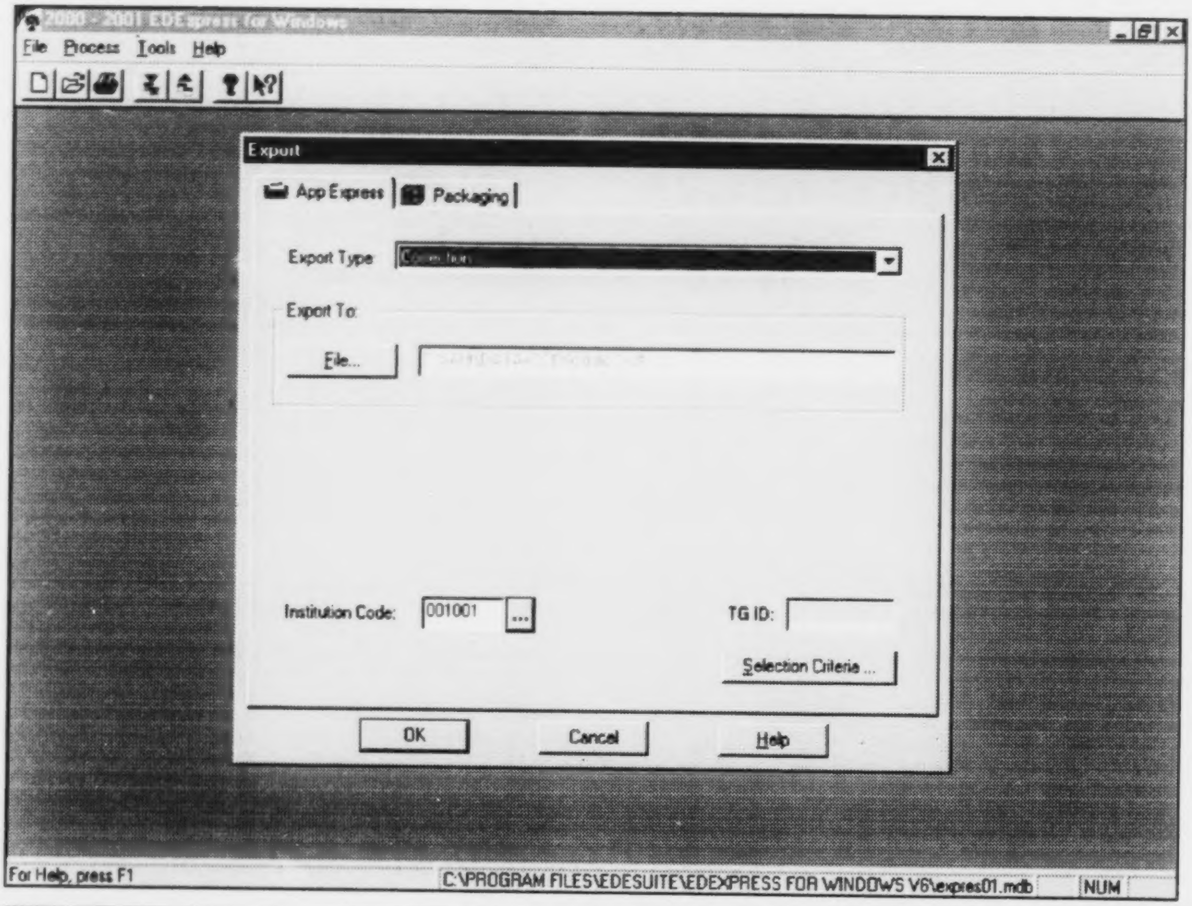
*Click the **App Express** tab.*

*Click the down arrow in the **Export Type** field to identify the data you are exporting.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Export
App Express
Packaging
Export To:
File...
Applications - Initial
Applications - Renewal
Applications - Initial & Renewal
Corrections
Duplicates
TG ID:
Selection Criteria...
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

Export Type: Applications - Initial

Select ***Corrections*** *from the pick list.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Export
App Express
Packaging
File...
Selection Criteria ...
OK
Cancel
Help

Export Type: Correction

Export To:

Institution Code: 001001

TG ID:

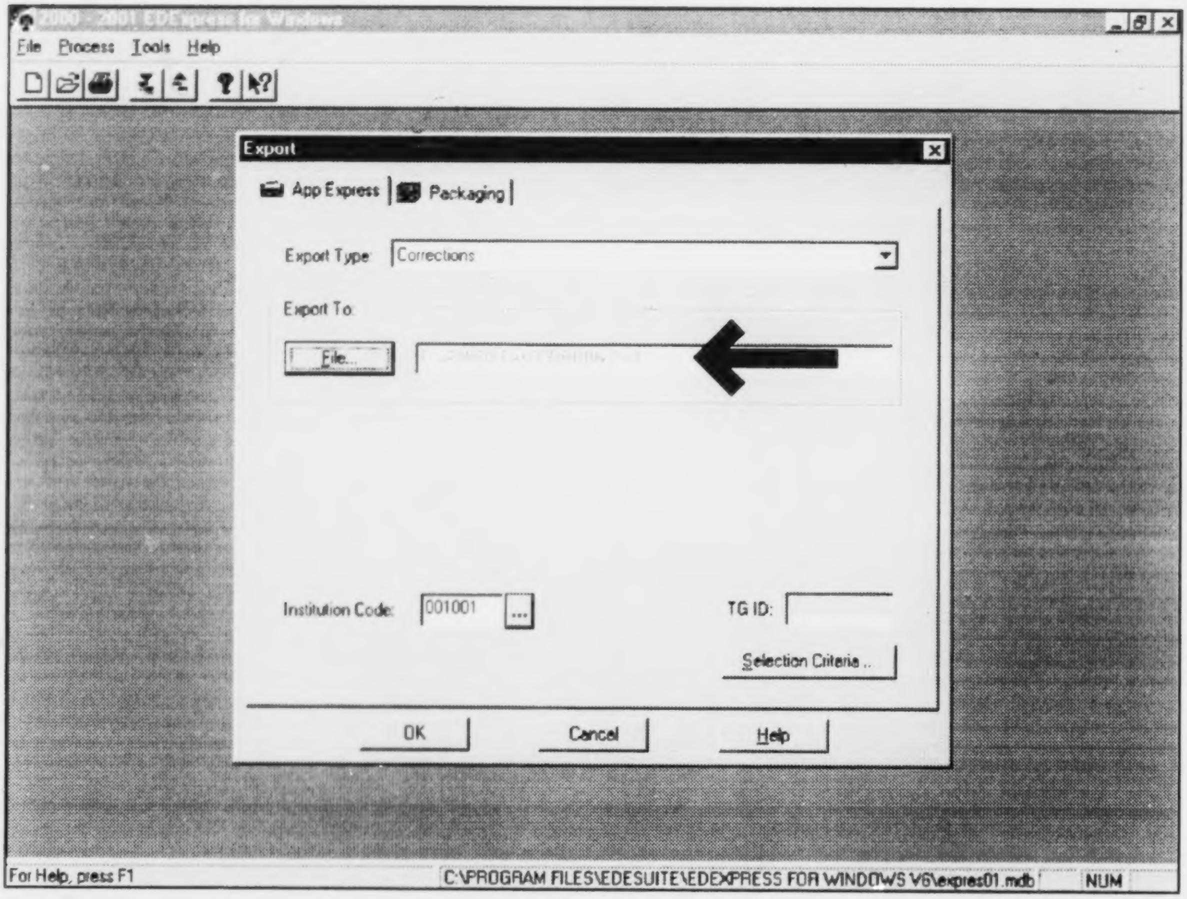
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

Verify the file location and file name in the Export To box.

*Click **OK**.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Export
App Express
Packaging
File...
Selection Criteria...
OK
Cancel
Help
NUM

Export Type: Corrections

Export To:

Institution Code: 001001

TG ID:

For Help, press F1

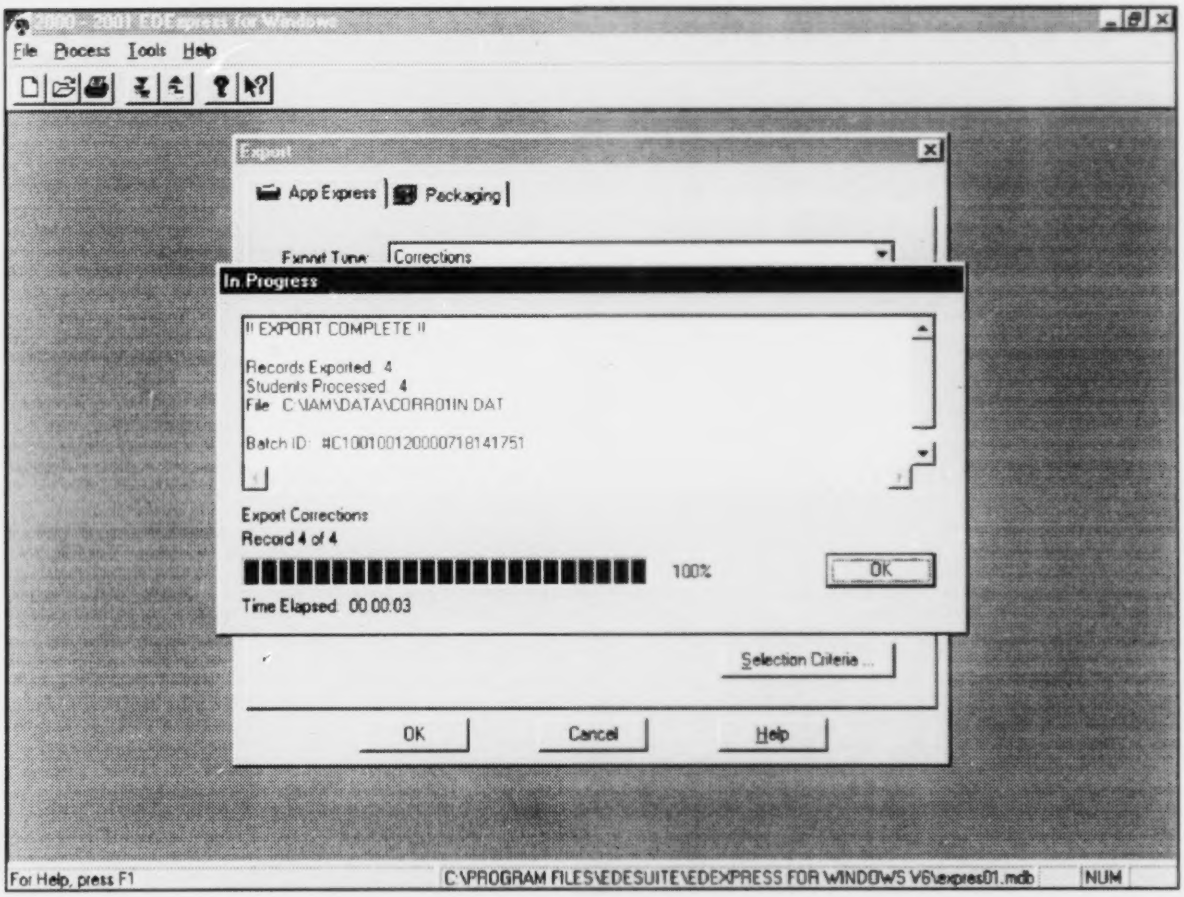
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Scroll down to see the batch ID

*Click **OK** to close*

When the export is complete, the Export Statistics box will display the number of records included in the batch and the file name

Note: The number of students and the number of records may not be consistent; more than one correction record may be created for a student if more than 12 fields are corrected.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Export
App Express
Packaging
In Progress
OK
Selection Criteria ...
OK
Cancel
Help
For Help, press F1
NUM

Export Type: Corrections

```
!! EXPORT COMPLETE !!

Records Exported: 4
Students Processed: 4
File: C:\IAM\DATA\CORR01IN.DAT

Batch ID: #C100100120000718141751
```

Export Corrections
Record 4 of 4
100%
Time Elapsed: 00:00:03

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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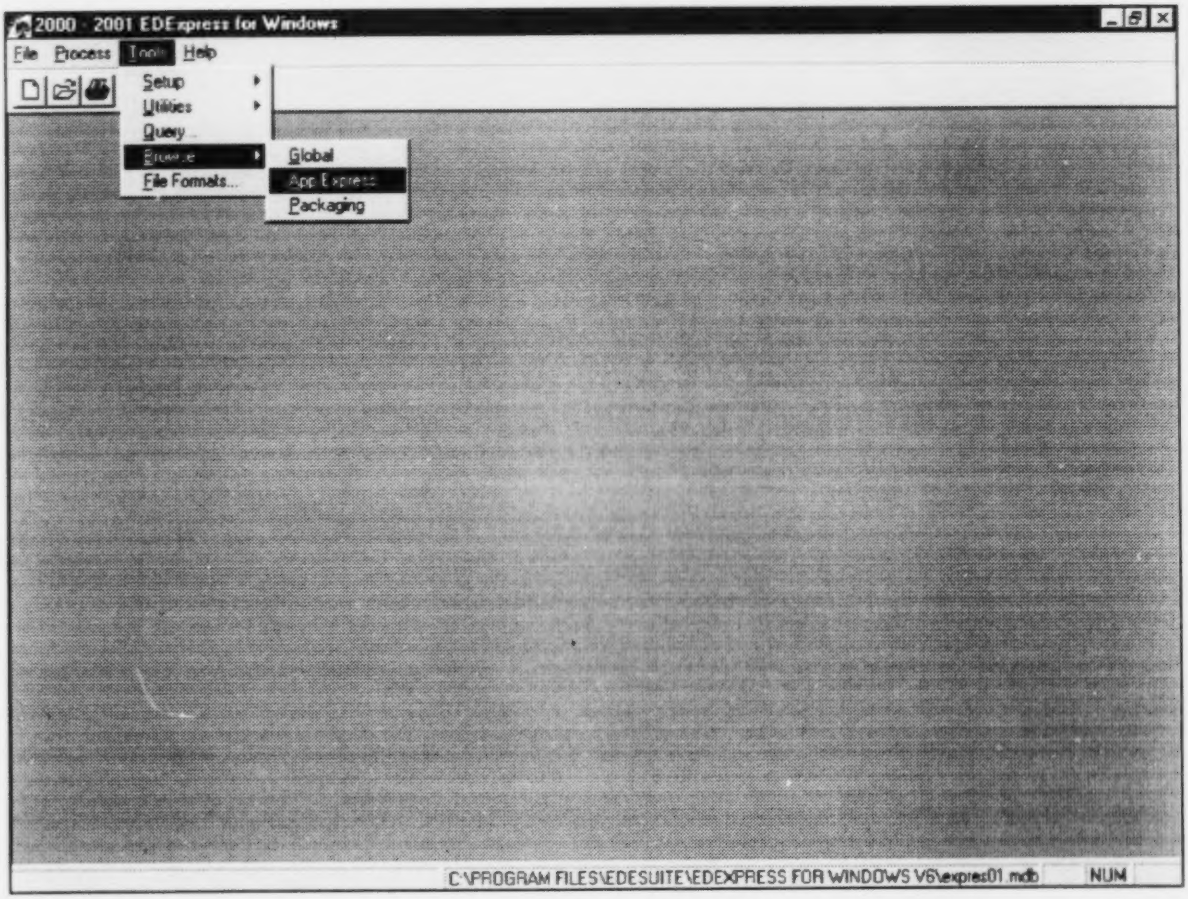
Batch Activity Browse

Just as you reviewed the batch activity information after you exported application records, you can review the correction batch you just exported, along with batches you have imported, after you import data.

*Select **Tools/Browse/ App Express** from the Menu bar.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

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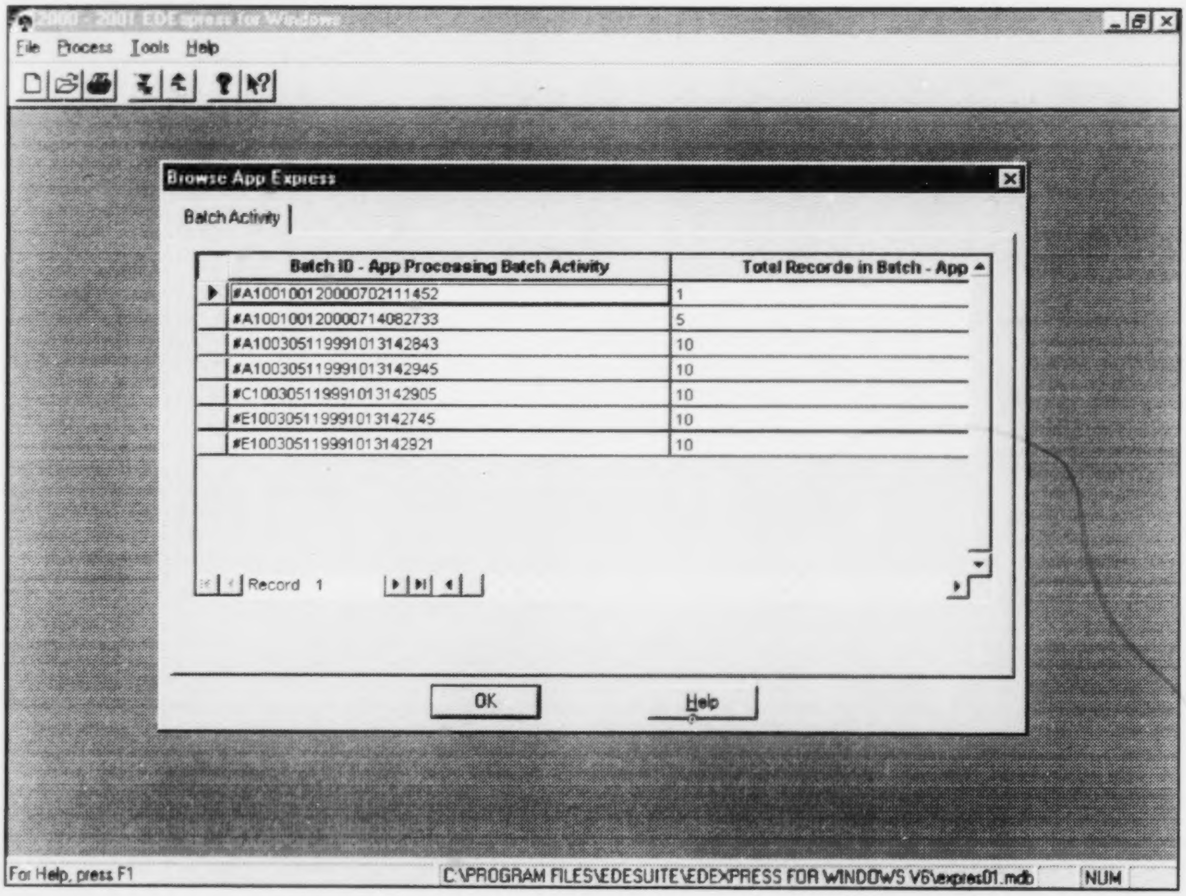
*Click **OK** to close the Batch Activity Log.*

The batch activity database listings are shown below. Notice that both the Electronic App and the Automatic ISIR are displayed.


2000 - 2001 EDExpress for Windows
File Process Tools Help
Browse App Express
Batch Activity
Record 1
OK
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Batch ID - App Processing Batch Activity	Total Records in Batch - App
#A10010012000070211452	1
#A100100120000714082733	5
#A100305119991013142843	10
#A100305119991013142945	10
#C100305119991013142905	10
#E100305119991013142745	10
#E100305119991013142921	10

Lesson 2 Exercise

Scenario:

In the first exercise for this unit, our Financial Aid Officer Maria completed several corrections to ISIR records. You are a financial aid counselor at the same school, and it is on your processing schedule today to export corrections to CPS.

Exercise Instructions:

The tasks for this exercised are outlined below. You will complete the tasks and answer questions that pertain to those tasks. Read the tasks AND the questions before you begin the exercise! Answers to some of the questions may be a part of the task or involve a computer response.

Export the corrections batch, and then answer the following questions:

1. What file type did you select in the Export To field?

2. How many records were exported in the batch?

3. What was the number of students processed in the batch?

4. BONUS QUESTION:

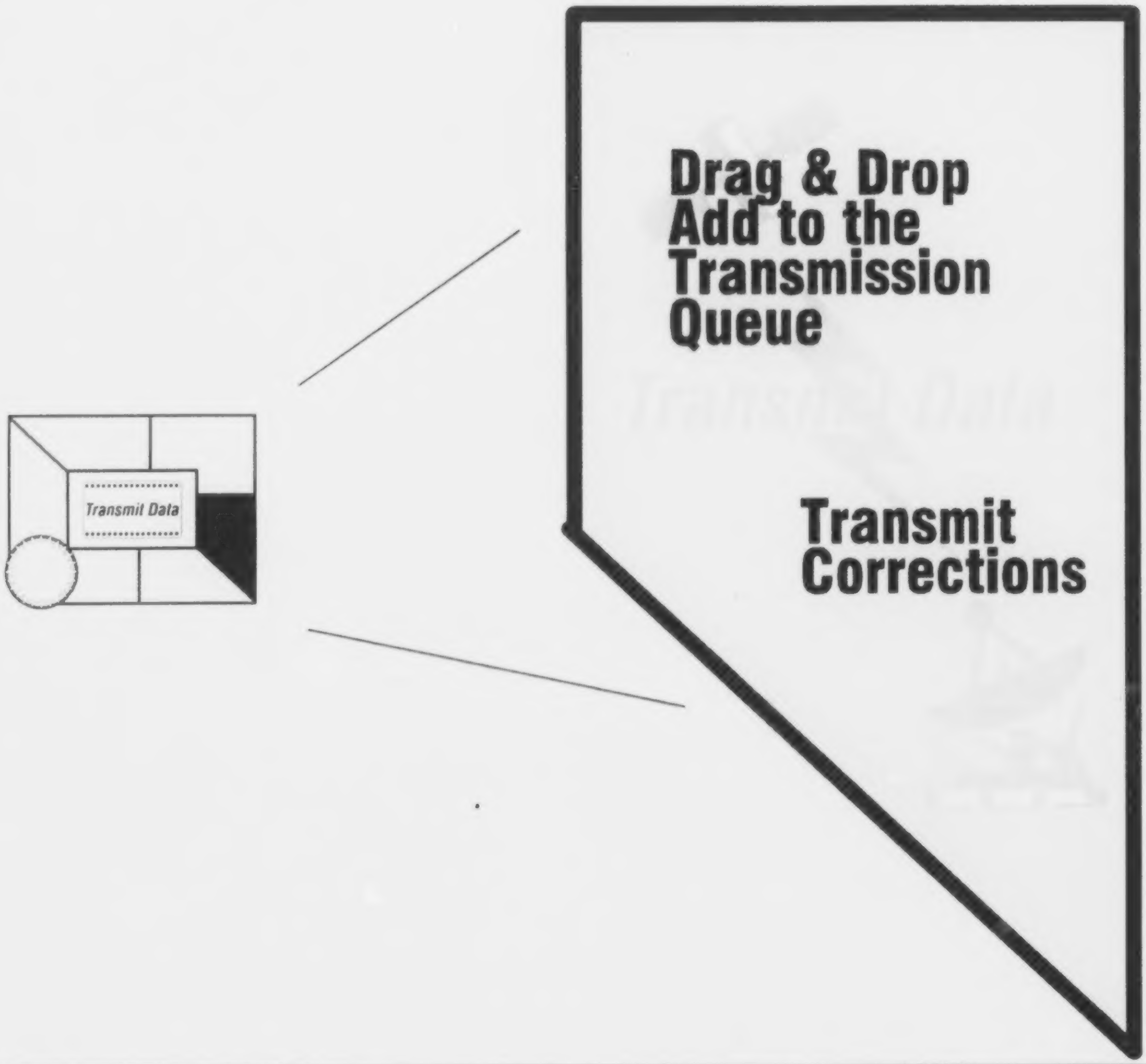
Will the number of students processed always equal the number of records exported? Why or why not?

Lesson 3 – Transmit Data

Objectives

At the end of this lesson you should be able to:

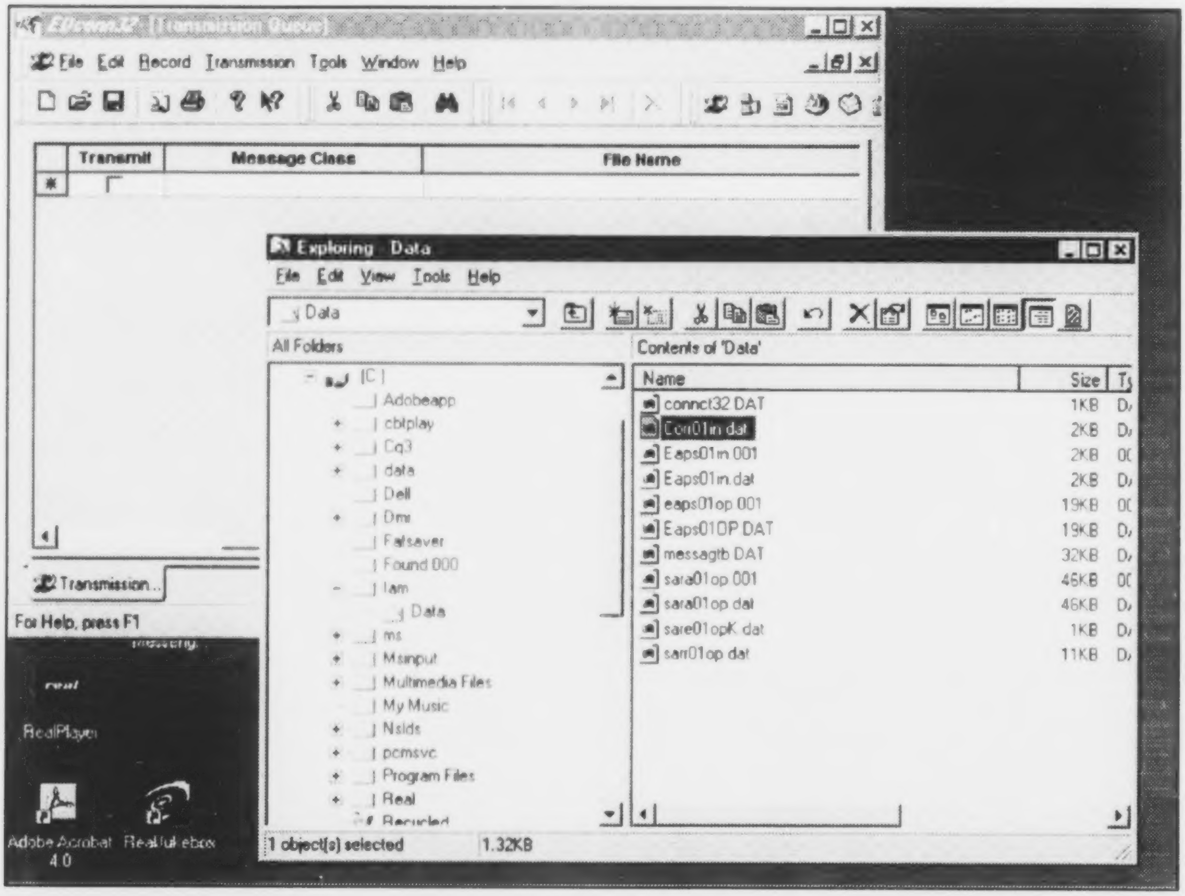
1. Add a record to the Transmission Queue using drag and drop.
2. Use the Transmit function to send a correction batch to CPS.


Transmit Data
Drag & Drop Add to the Transmission Queue
Transmit Data
Transmit Corrections

Add a Record using Drag and Drop

In Unit 2, you learned how a batch can be automatically added to the EDconn32 Transmission Queue when it is exported from EDExpress. A second method for adding records to the Transmission Queue uses the drag and drop feature of Windows. To accomplish this, you need to have both EDconn32 and the Windows Explorer open at the same time as in the graphic below. Since you just exported a batch of corrections in lesson 2, you will need to transmit that batch to the network.

Locate the file you want to transmit.


EDconn32 - [Transmission Queue]
File Edit Record Transmission Tools Window Help
Transmit
Message Class
File Name
Transmission...
For Help, press F1
RealPlayer
Adobe Acrobat 4.0
RealJukebox
Exploring - Data
File Edit View Tools Help
Data
All Folders
(C:)
Adobeapp
cblplay
Cq3
data
Dell
Dmi
Fatsaver
Found.000
Iam
Data
ms
Msinput
Multimedia Files
My Music
Nslds
pcmsvc
Program Files
Real
Recycled
Contents of 'Data'

Name	Size
connct32 DAT	1KB
Corr01in dat	2KB
Eaps01in 001	2KB
Eaps01in.dat	2KB
eaps01op 001	19KB
Eaps01OP DAT	19KB
messagtb DAT	32KB
sara01op 001	46KB
sara01op dat	46KB
sare01opK dat	1KB
sarr01op dat	11KB

1 object(s) selected 1.32KB

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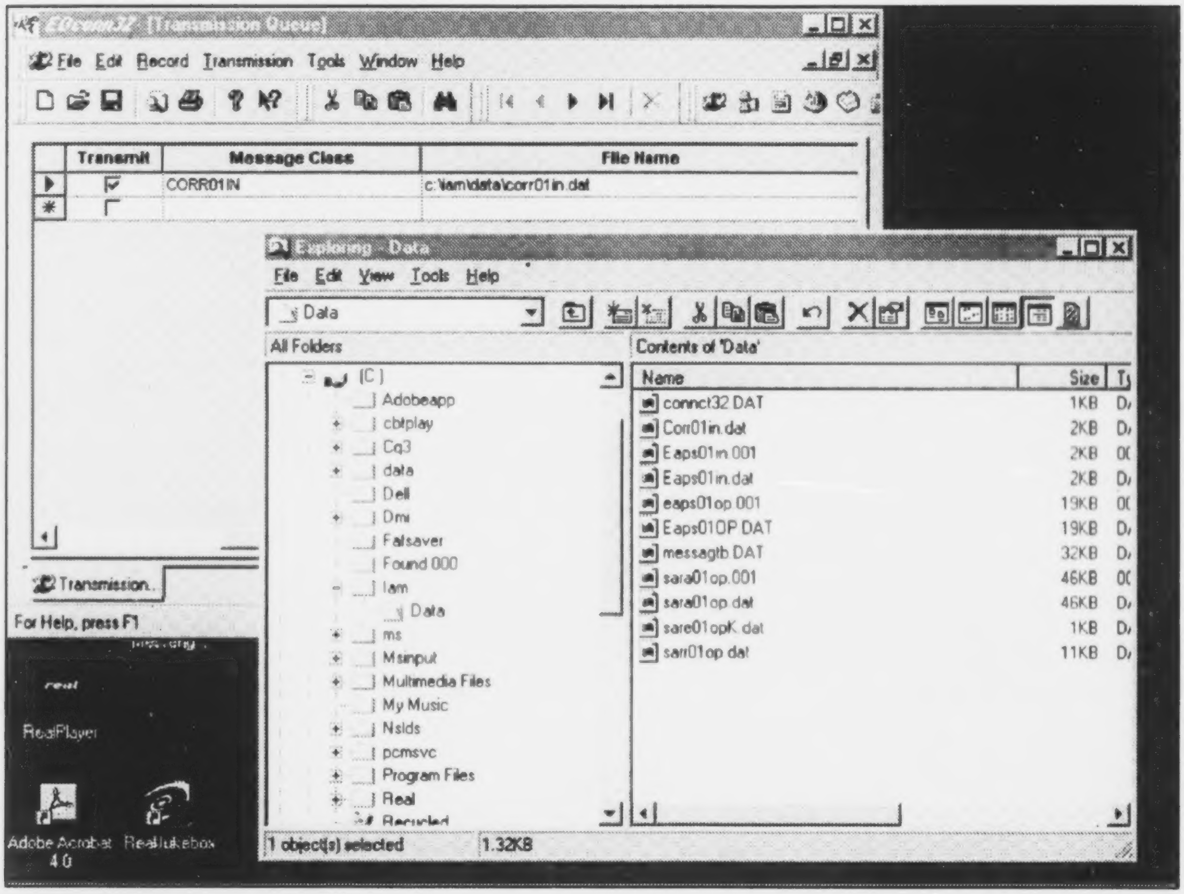
Click on the file, hold and drag to the ***Transmission Queue*** *window.*

Now you are ready to drag and drop the file to EDconn32.

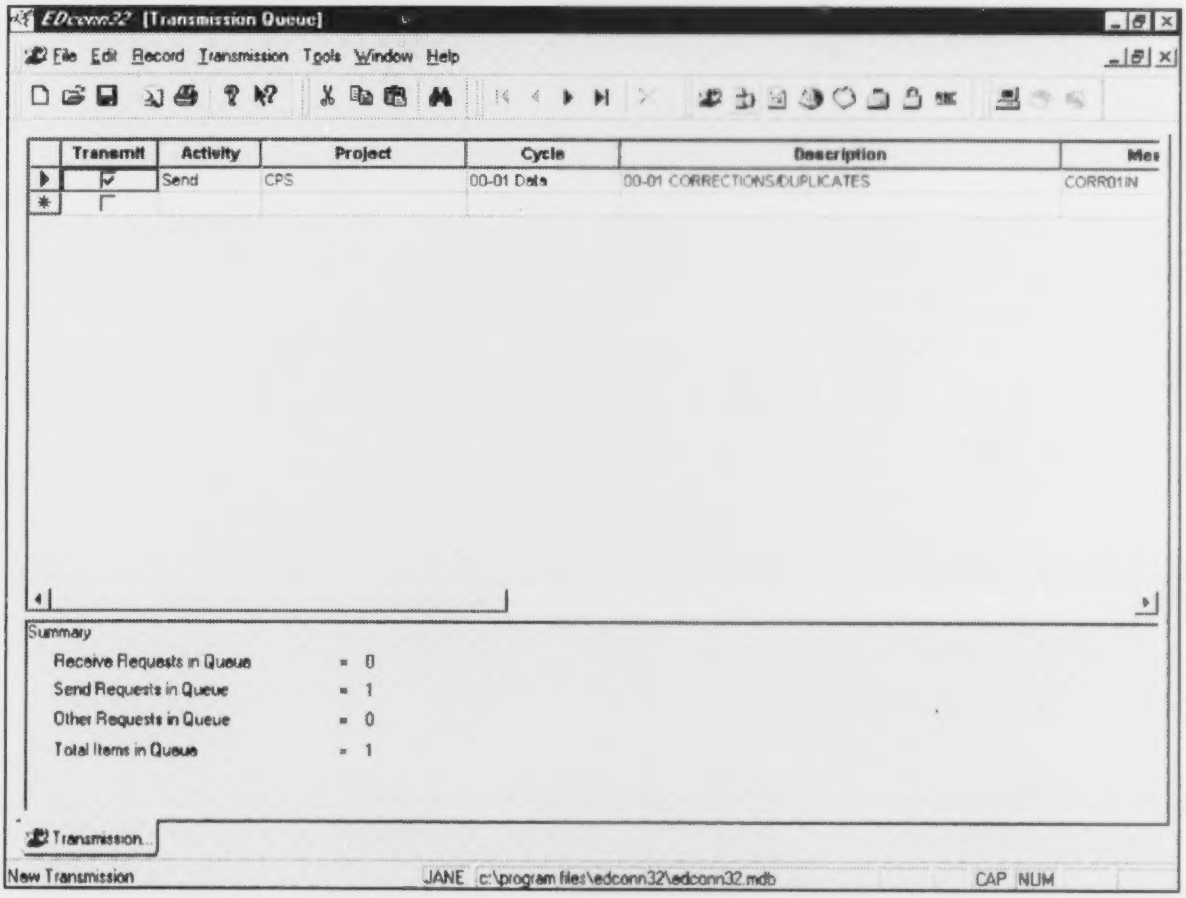

EDconn32 - [Transmission Queue]
File Edit Record Transmission Tools Window Help
Exploring - Data
File Edit View Tools Help
Data
All Folders
Contents of 'Data'
(C:)
Adobeapp
cbtplay
Cq3
data
Dell
Dmi
Falsaver
Found.000
Iam
Data
ms
Msinput
Multimedia Files
My Music
Nslds
pcmsvc
Program Files
Real
Recycled
Transmission...
For Help, press F1
RealPlayer
Adobe Acrobat 4.0
RealJukebox

	Transmit	Message Class	File Name
▶	☑	CORR01IN	c:\iam\data\corr01in.dat
*	☐		

Name	Size
connct32.DAT	1KB
Corr01in.dat	2KB
Eaps01in.001	2KB
Eaps01in.dat	2KB
eaps01op.001	19KB
Eaps01OP.DAT	19KB
messagtb.DAT	32KB
sara01op.001	46KB
sara01op.dat	46KB
sare01opK.dat	1KB
sarr01op.dat	11KB

1 object(s) selected 1.32KB

EDconn32 recognized that this was a Send file to CPS based on the filename. Notice all fields in the record are automatically filled when you drop the file.


EDconn32 [Transmission Queue]
File Edit Record Transmission Tools Window Help
Transmission...

	Transmit	Activity	Project	Cycle	Description	Mes
▶	☑	Send	CPS	00-01 Data	00-01 CORRECTIONS/DUPLICATES	CORR01IN
✱	☐					

Summary

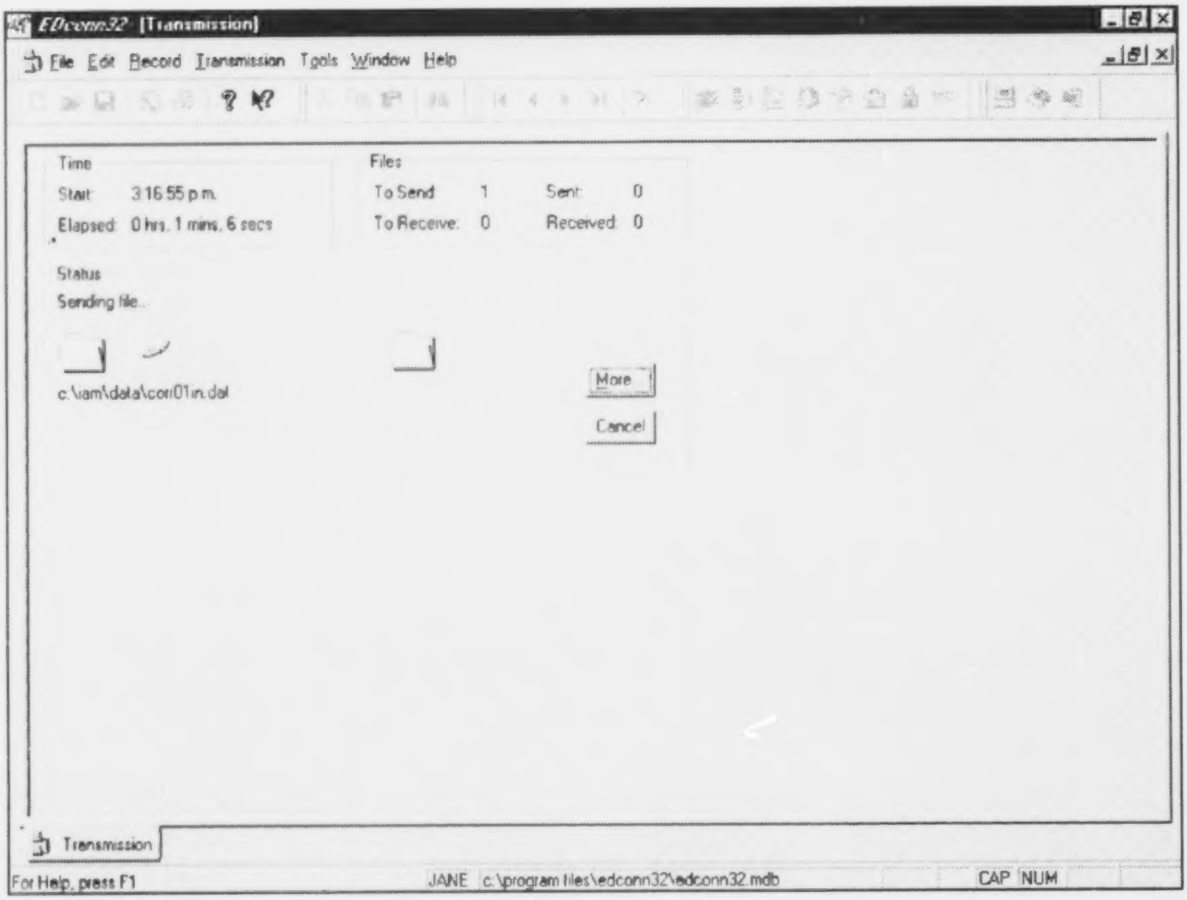
Receive Requests in Queue = 0
Send Requests in Queue = 1
Other Requests in Queue = 0
Total Items in Queue = 1

New Transmission | JANE | c:\program files\edconn32\edconn32.mdb | CAP | NUM

Transmit Corrections

*Click the **Transmit** icon to begin the transmission.*

The transmit process is the same for all types of send data. During the transmission you can see that there is one file to send. The file name is displayed as the file is being transmitted.


EDconn32 [Transmission]
File Edit Record Transmission Tools Window Help
More
Cancel
Transmission

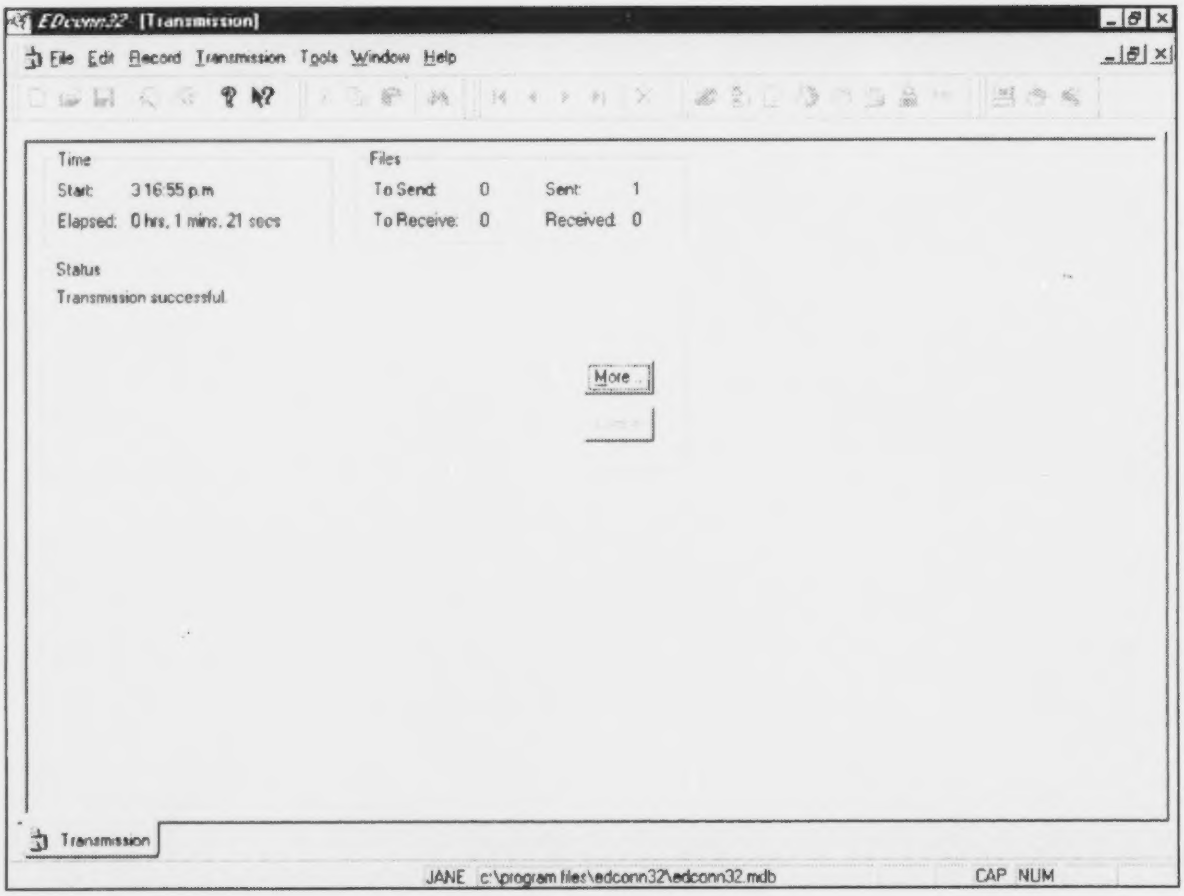
Time
Start: 3:16:55 p.m.
Elapsed: 0 hrs, 1 mins, 6 secs

Files
To Send: 1
Sent: 0
To Receive: 0
Received: 0

Status
Sending file...
c:\iam\data\corr01in.dat

For Help, press F1 JANE c:\program files\edconn32\edconn32.mdb CAP NUM

Once the transmission is complete, the Files box indicates the number of files sent, and the Status box indicates that the transmission was successful.


EDconn32 - [Transmission]
File Edit Record Transmission Tools Window Help
More...
Transmission

Time

Start: 3:16:55 p.m

Elapsed: 0 hrs, 1 mins, 21 secs

Files

To Send:	0	Sent:	1
To Receive:	0	Received:	0

Status

Transmission successful.

JANE c:\program files\edconn32\edconn32.mdb CAP NUM

Lesson 3 Exercise

Scenario:

According to your processing schedule today is the day to transmit the correction records you just exported. You will be using a simulation of EDconn32 to complete this task.

Exercise Instructions:

The tasks for this exercised are outlined below. You will complete the tasks and answer questions that pertain to those tasks. Read the tasks AND the questions before you begin the exercise! Answers to some of the questions may be a part of the task or involve a computer response.

1. Open and log in to EDconn32.

Step	Action
1	From the taskbar, click **Start/Programs**. Then select the **EDconn32** program group and **Edconn32 (Unit 3, Lesson 3)**.
2	Type the User ID: **Jane**.
3	Type the Password: **Jane123**.
4	Click **OK**.
5	Click **OK** to close the Tip of the Day.

2. Add a record to the Transmission Queue using drag and drop.

Step	Action
1	Click the resize box in the top right corner of the window.
2	Locate and drag the correction file to the EDconn32 transmission queue.
3	Click the resize box in the top right corner of the EDconn32 window.

3. Record your activity in the Transmission Processing Log.

4. Transmit the correction batch.

5. Close the window when the transmission is completed.

Lesson 3 Exercise, continued

1. How did you know which file to select from the Explorer window?

2. Are all the fields in the transmission queue automatically completed when you drag and drop the file?

More Thinking

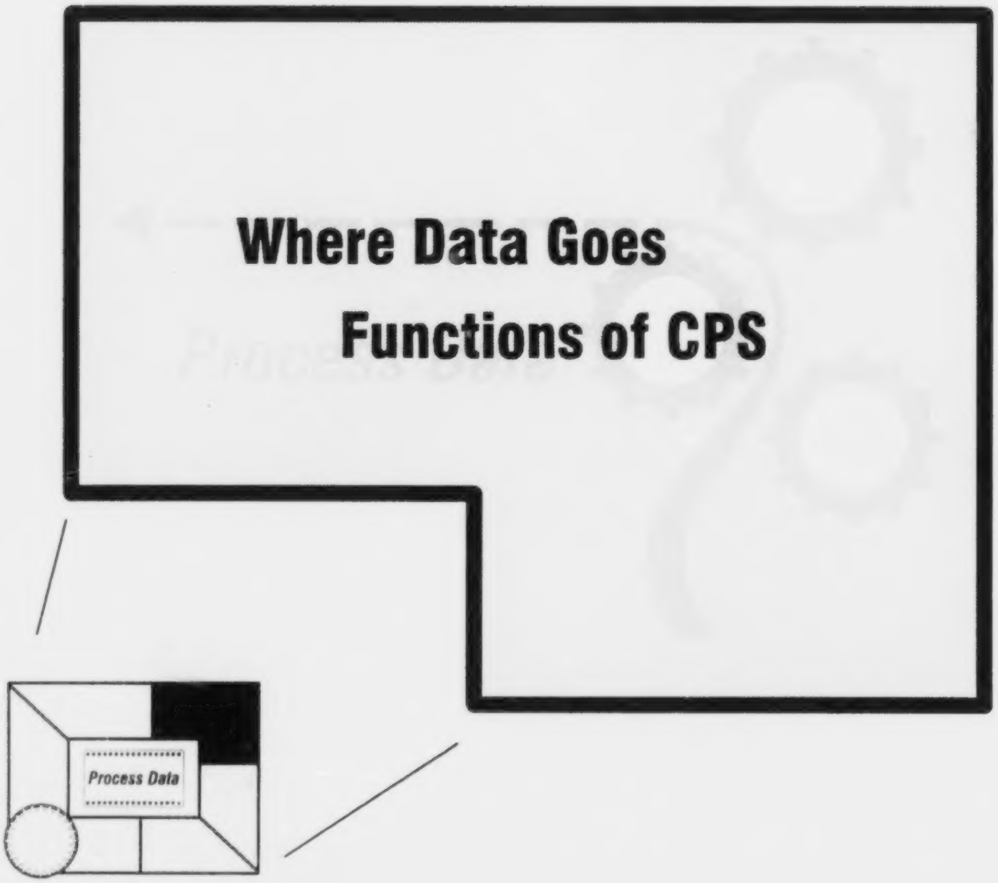
When can you anticipate receiving the processed ISIRs from this correction batch?

Lesson 4 - Process Data

Objectives

At the end of this lesson you should be able to:

1. Understand how a correction record is processed by the CPS



Where Data Goes

Functions of CPS

Correction Record Processing

Only corrected information from a student's record, not the complete applicant record, is transmitted to the CPS. When you institution submits an ISIR correction to the CPS, the specified transaction is used as a template. Changes are made to the fields specified in the correction record, and other fields are left unchanged. The processed results are returned in the SARR01OP message class. All other institutions listed on the transaction will receive the new ISIR in a SARA01OP message class file.

What happens during the compute process?

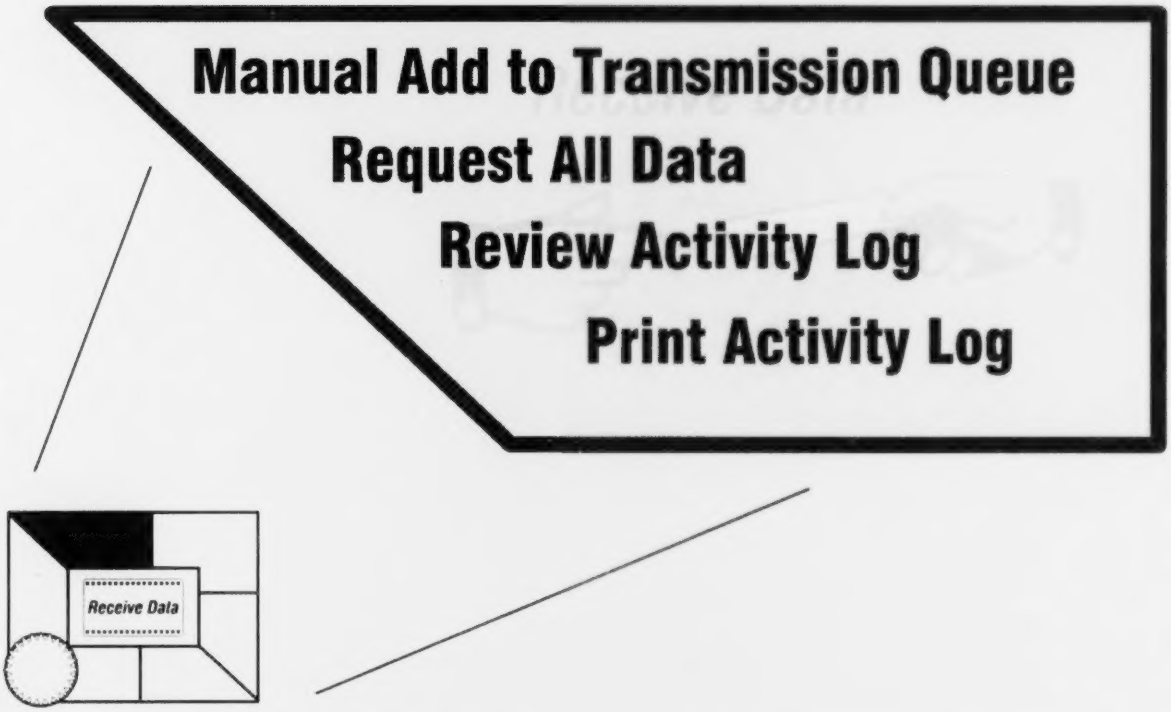
- The CPS contains a series of edits that evaluate all incoming application and correction data for consistency and completeness. An EFC is not computed for a correction rejected for a compute reject reason.
- All correction records are sent to at least two external match: Prisoner and NSLDS (so every ISIR contains the most recent financial aid history information). The record may be sent to the other data matches depending on the data provided in the previous transaction. Example: The record would be sent to the Social Security Administration if there was no previous SSN match and one of the identifying data elements, such as date of birth, has been changed.
- A new EFC is calculated (if possible) based on the corrections submitted, and a new ISIR is created.
- You will receive one batch of ISIRs for each batch of correction records submitted. The SARR01OP file contains one ISIR for ever submitted student correction or student duplicate request, not rejected for a transaction reject reason.

Lesson 5 – Receive Data

Objectives

At the end of this lesson you should be able to:

1. Add a record to the Transmission Queue using manual entry.
2. Create a Request to retrieve records from the network mailbox.
3. Review the Activity Log for transmission activity.
4. Print the Activity Log.



Manual Add to Transmission Queue

Request All Data

Review Activity Log

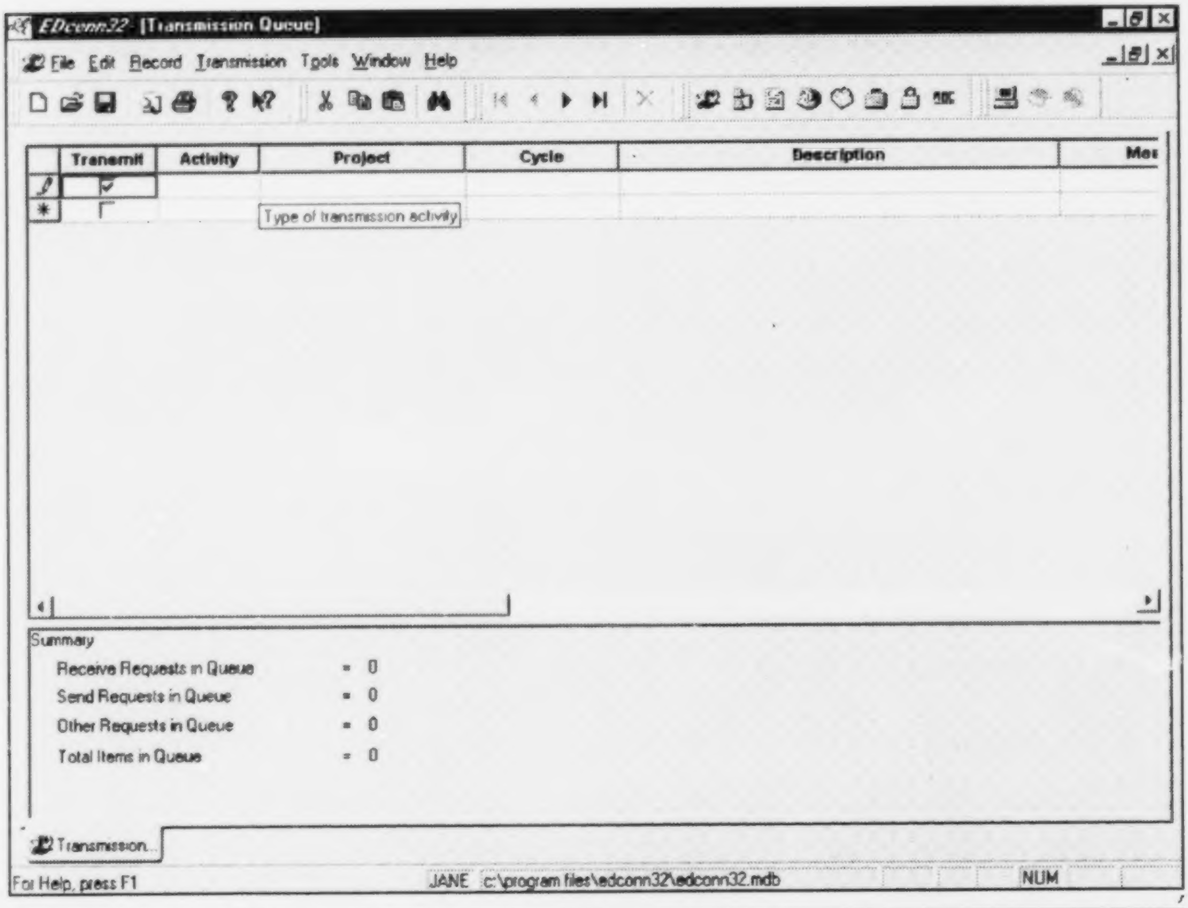
Print Activity Log

Add a Record using Manual Entry

Another method for adding records to the Transmission Queue is manual entry. This involves making selections in each column of the row or record in the queue. In this example the Transmission Queue is already open. Since you are expecting to receive the corrected ISIRs from CPS, you will create a request for all CPS data.

*Click the **Transmission Queue** button.*

*Click the cell in the **Transmit** column to add a row. Click the **Transmit** column box to include this record in the next transmission.*


EDconn32 - [Transmission Queue]
File
Edit
Record
Transmission
Tools
Window
Help
Transmission...

	Transmit	Activity	Project	Cycle	Description	Mes
✎	☑					
*	☐					

Type of transmission activity

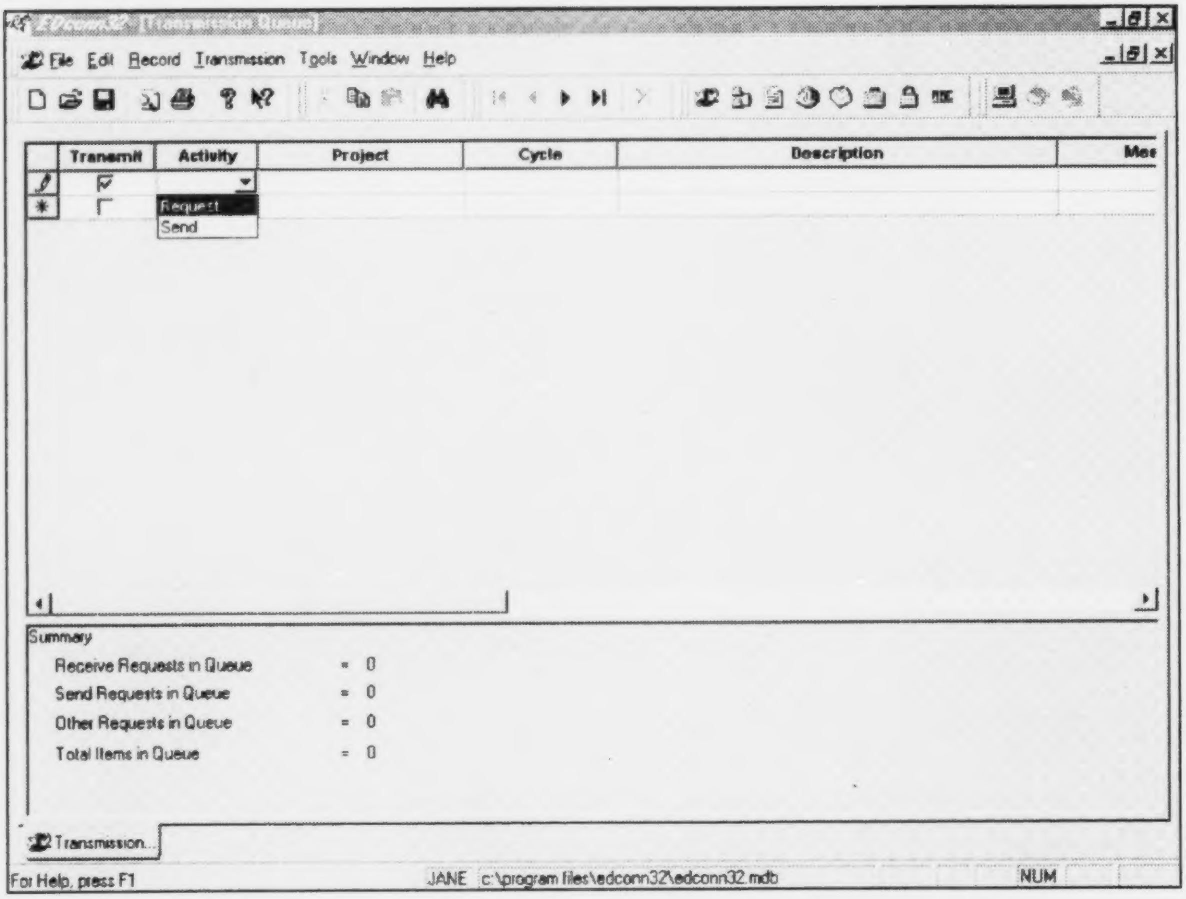
Summary

Receive Requests in Queue = 0
Send Requests in Queue = 0
Other Requests in Queue = 0
Total Items in Queue = 0

For Help, press F1 JANE c:\program files\edconn32\edconn32.mdb NUM

Next, click the ***Activity*** *column. Then click the scroll button to select* ***Request****.*

The Activity column indicates whether this is a send or request activity.


EDconn32 - [Transmission Queue]
File Edit Record Transmission Tools Window Help
Transmit
Activity
Project
Cycle
Description
Mes
☑
☐
Request
Send
Transmission
For Help, press F1
JANE
c:\program files\edconn32\edconn32.mdb
NUM

Summary

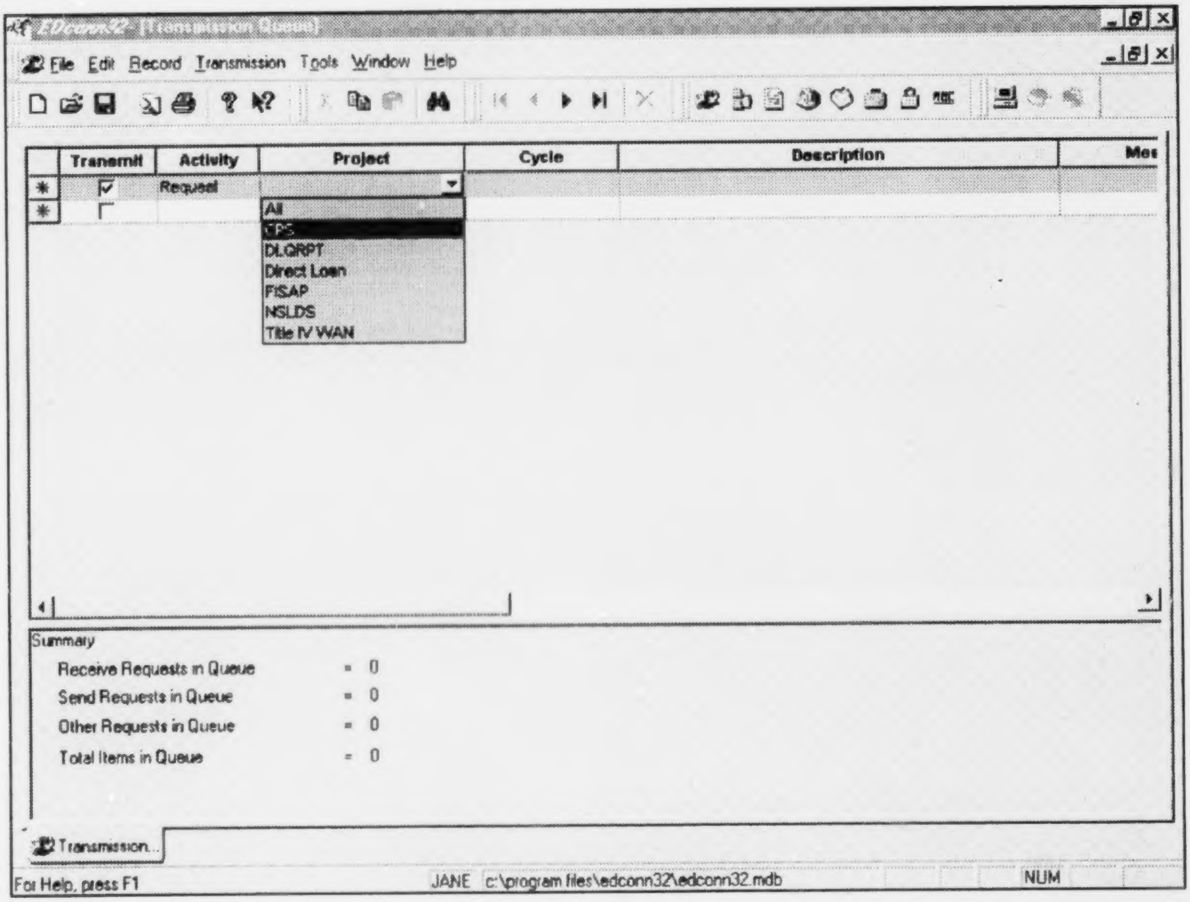
Receive Requests in Queue = 0

Send Requests in Queue = 0

Other Requests in Queue = 0

Total Items in Queue = 0

To designate data created by CPS, click the cell in the ***Project*** *column and select* ***CPS***.


EDconn32 - [Transmission Queue]
File Edit Record Transmission Tools Window Help
All
CPS
DLQRPT
Direct Loan
FISAP
NSLDS
Title IV WAN
Transmission...
For Help, press F1
NUM

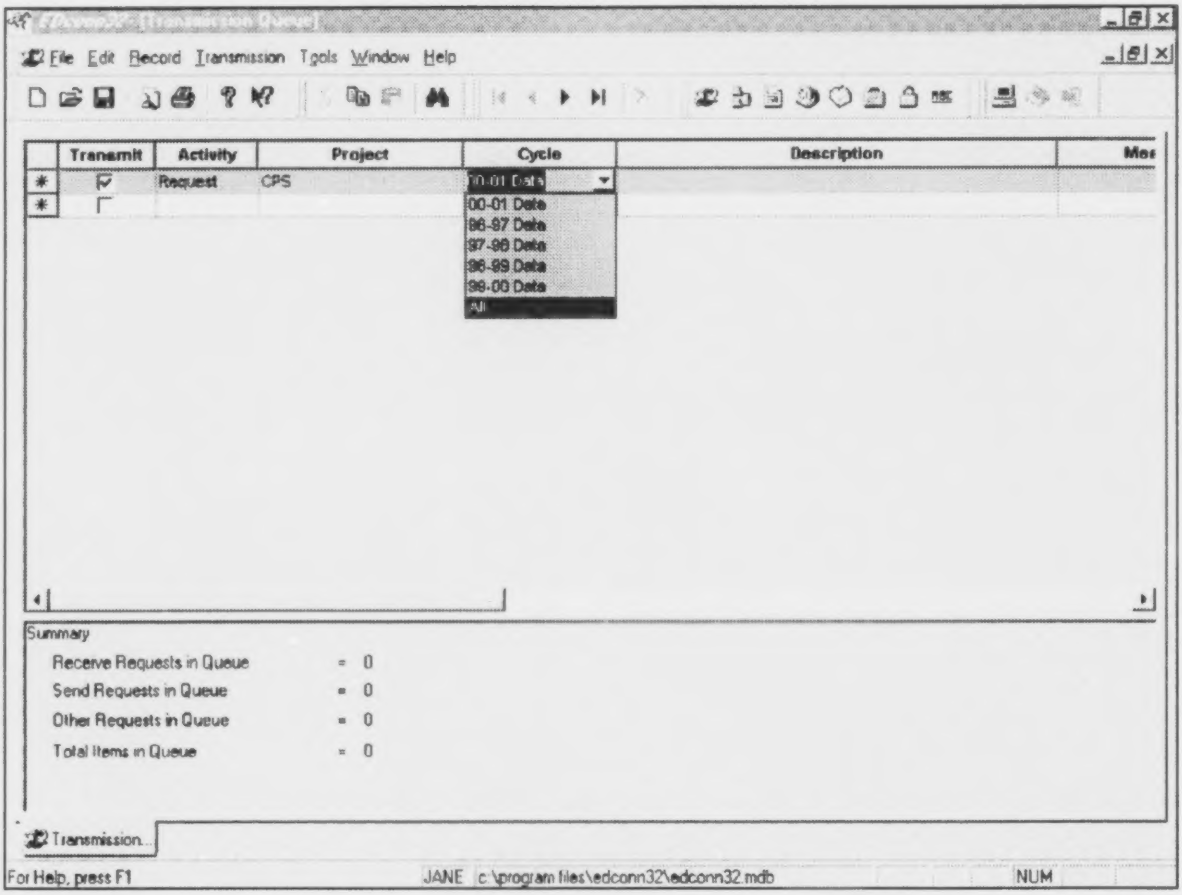
	Transmit	Activity	Project	Cycle	Description	Mes
*	☑	Request				
*	☐					

Summary

Receive Requests in Queue = 0
Send Requests in Queue = 0
Other Requests in Queue = 0
Total Items in Queue = 0

JANE c:\program files\edconn32\edconn32.mdb

*Click the **Cycle** column to indicate the year data is being requested for. Since we do not know what types of files may be in our mailbox, we will select All to retrieve any CPS file.*


EDconn32 - [Transmission Queue]
File
Edit
Record
Transmission
Tools
Window
Help
00-01 Data
96-97 Data
97-98 Data
98-99 Data
99-00 Data
All
Transmission
For Help, press F1
NUM

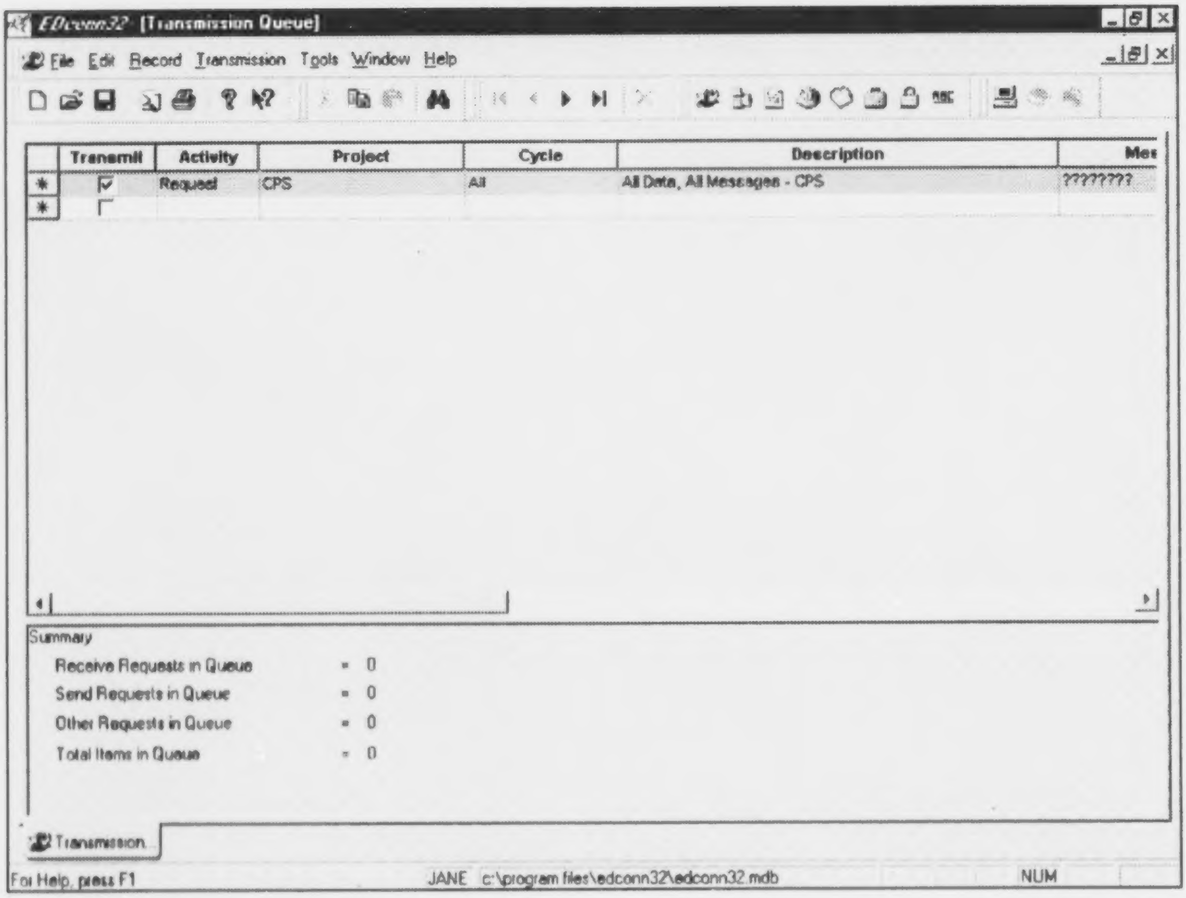
	Transmit	Activity	Project	Cycle	Description	Mes
*	☑	Request	CPS	00-01 Data		
*	☐					

Summary

Receive Requests in Queue = 0
Send Requests in Queue = 0
Other Requests in Queue = 0
Total Items in Queue = 0

JANE c:\program files\edconn32\edconn32.mdb

To indicate the kind of data being requested, you must select a description. In this example, we want all of the different types of CPS data possible.


EDconn32 - [Transmission Queue]
File
Edit
Record
Transmission
Tools
Window
Help
Transmission

	Transmit	Activity	Project	Cycle	Description	Mes
*	☑	Request	CPS	All	All Data, All Messages - CPS	????????
*	☐					

Summary

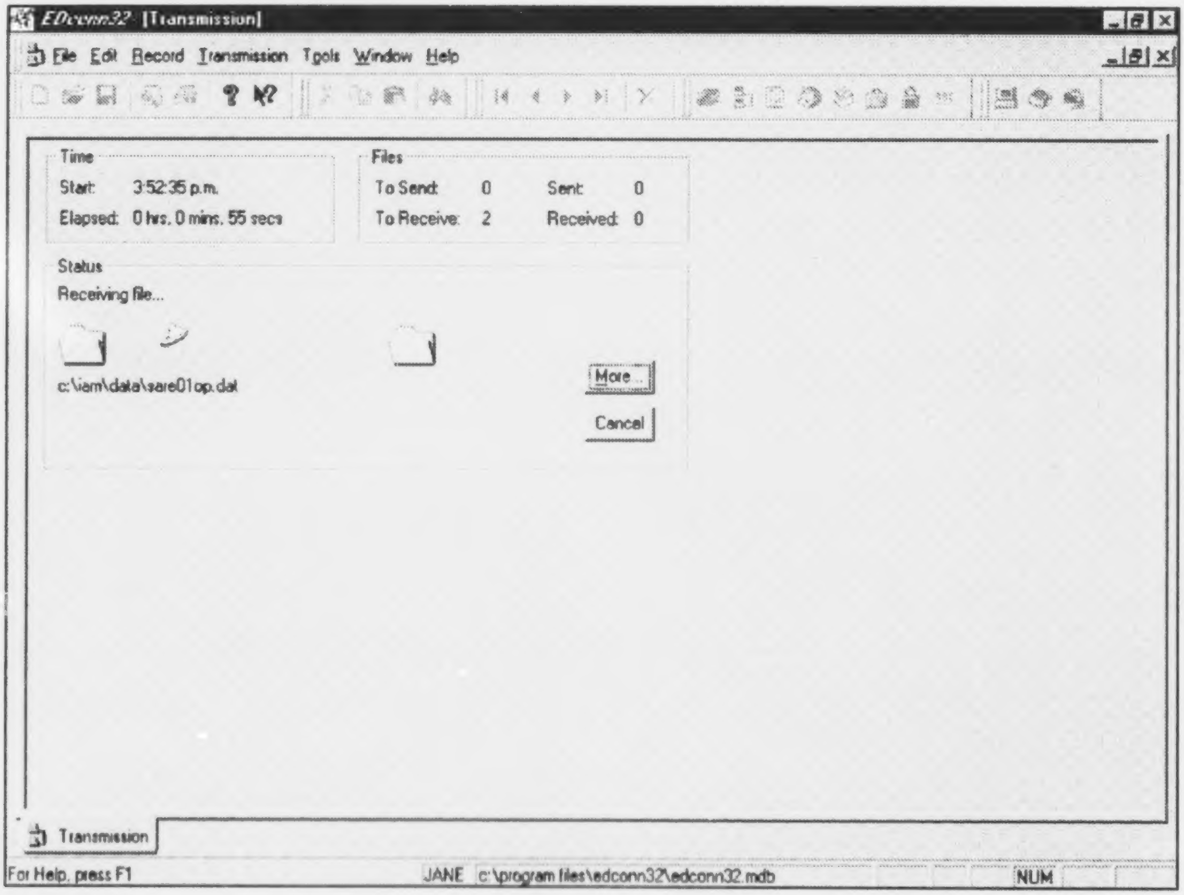
Receive Requests in Queue = 0
Send Requests in Queue = 0
Other Requests in Queue = 0
Total Items in Queue = 0

For Help, press F1 JANE c:\program files\edconn32\edconn32.mdb NUM

Transmit a Request

Click the ***Transmit*** *icon or select* ***Transmission /Now*** *from the menu to begin the transmission.*

Once again, you will use the Transmit function to send the request just created. During this transmission, the Files box indicates that there are two files to retreive from the mailbox. The first file to be reviewed is a corrections error file (SARE).


EDconn32 - [Transmission]
File Edit Record Transmission Tools Window Help
More...
Cancel
Transmission

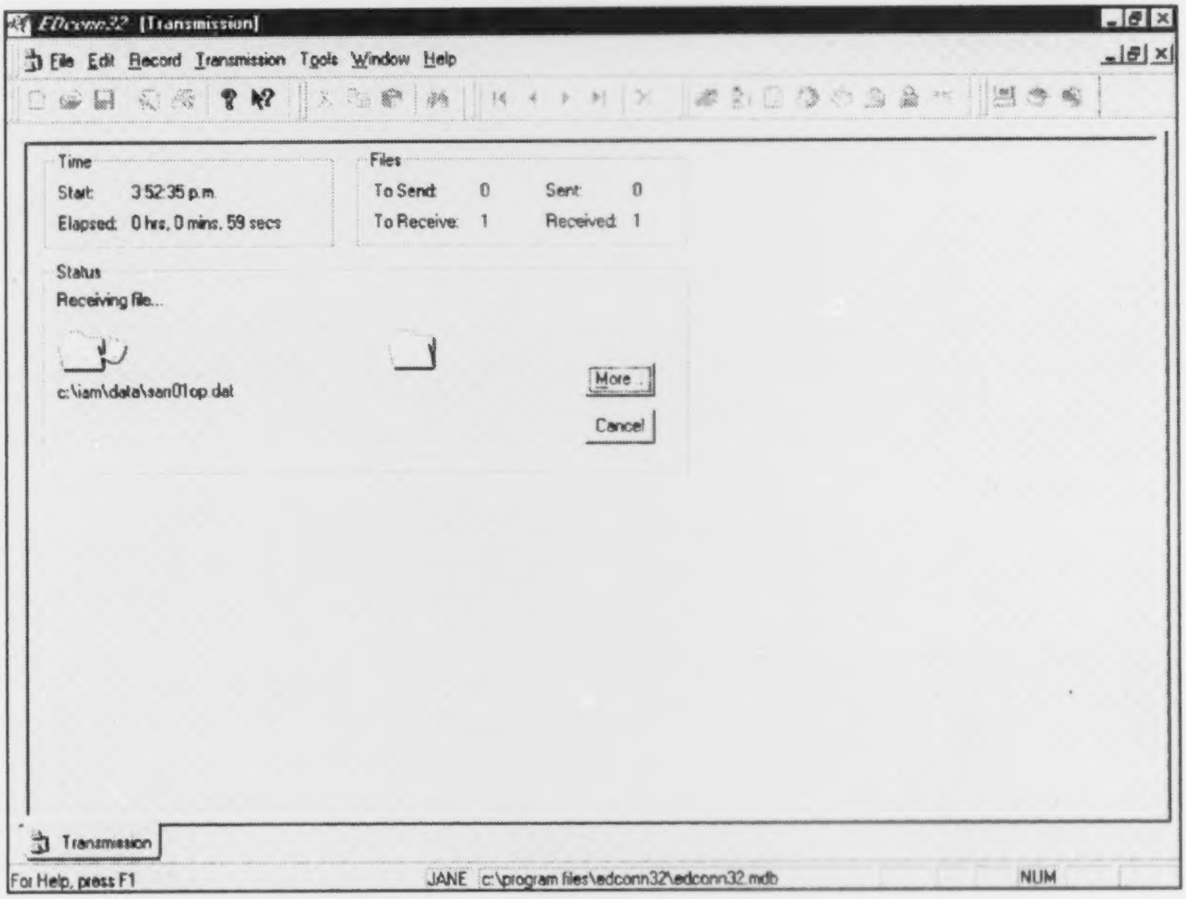
Time
Start: 3:52:35 p.m.
Elapsed: 0 hrs, 0 mins, 55 secs

Files
To Send: 0 Sent: 0
To Receive: 2 Received: 0

Status
Receiving file...
c:\iam\data\sare01op.dat

For Help, press F1 JANE c:\program files\edconn32\edconn32.mdb NUM

The second file to be received is a batch of corrected ISIRs (SARR message class).


EDconn32 [Transmission]
File Edit Record Transmission Tools Window Help
More...
Cancel
Transmission

Time
Start: 3:52:35 p.m.
Elapsed: 0 hrs, 0 mins, 59 secs

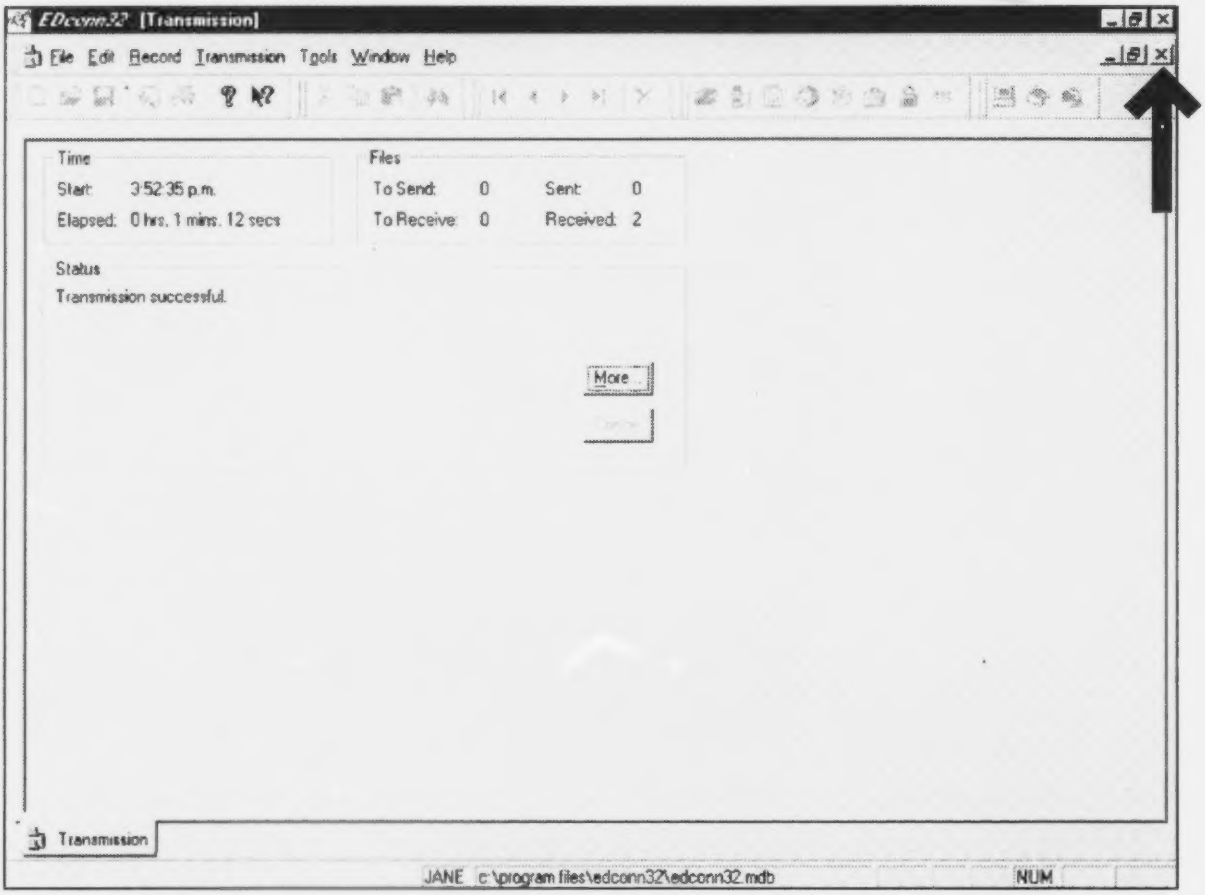
Files
To Send: 0 Sent: 0
To Receive: 1 Received: 1

Status
Receiving file...
c:\iam\data\sarr01op.dat

For Help, press F1 JANE c:\program files\edconn32\edconn32.mdb NUM

*Click the Close(**X**) button to exit the Transmission Queue.*

Once the transmission is complete, the Files box indicates the number of files received, and the Status box indicates that the transmission was successful. Two files were received during the transmission.


EDconn32 [Transmission]
File
Edit
Record
Transmission
Tools
Window
Help
More...
Transmission
NUM

Time
Start: 3:52:35 p.m.
Elapsed: 0 hrs, 1 mins, 12 secs

Files
To Send: 0
Sent: 0
To Receive: 0
Received: 2

Status
Transmission successful.

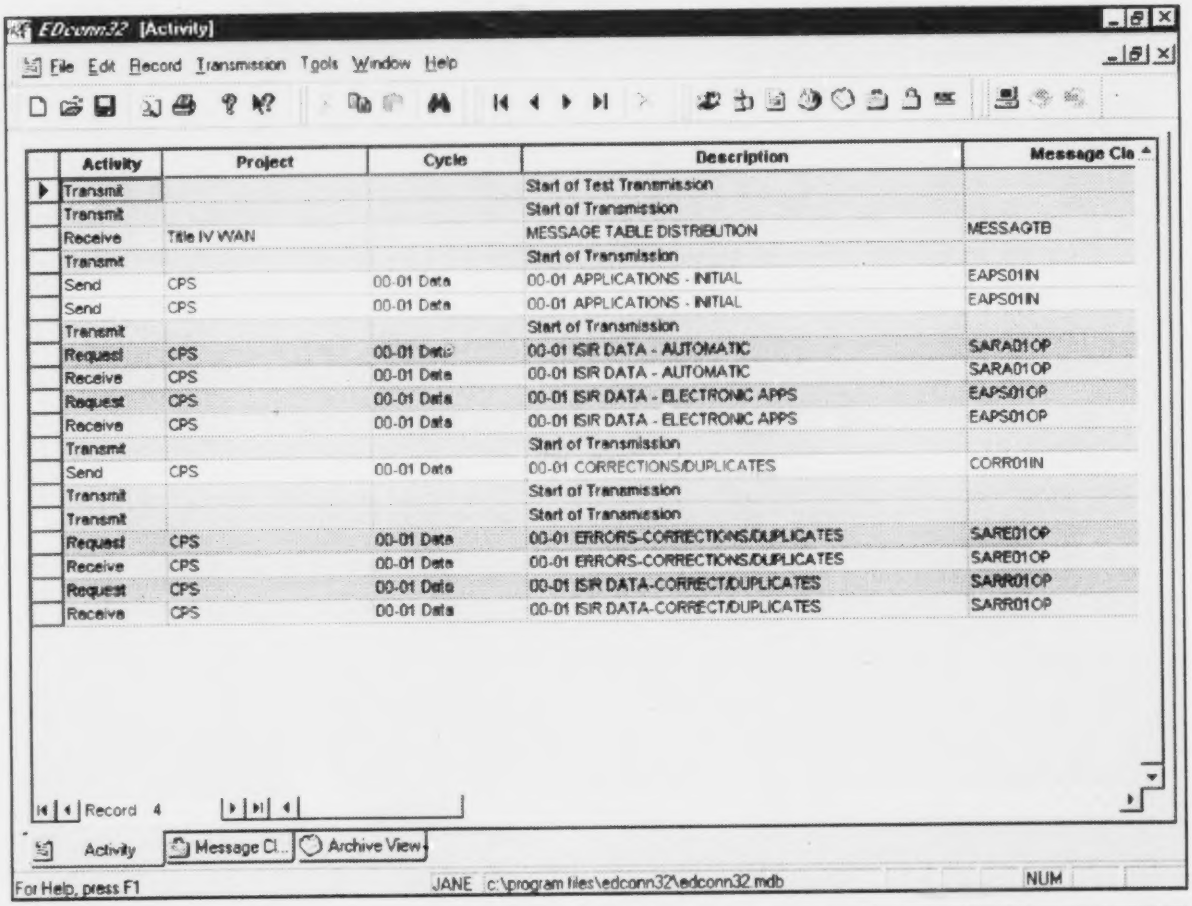
JANE c:\program files\edconn32\edconn32.mdb

Review the Activity Log

At the conclusion of each transmission, the results of what happened to each batch in the transmission are stored in the Activity Log. Each row in the log represents a different transmission activity. All of the information about the transaction is stored including:

- Project
- Cycle Year
- Description
- Message Class
- Filename
- Mailbox
- Item Number
- User ID
- Add ID, Date and Time

*To view the Activity Log, click the **Activity Log** icon on the toolbar. Click the horizontal and vertical scroll bars to view more information.*

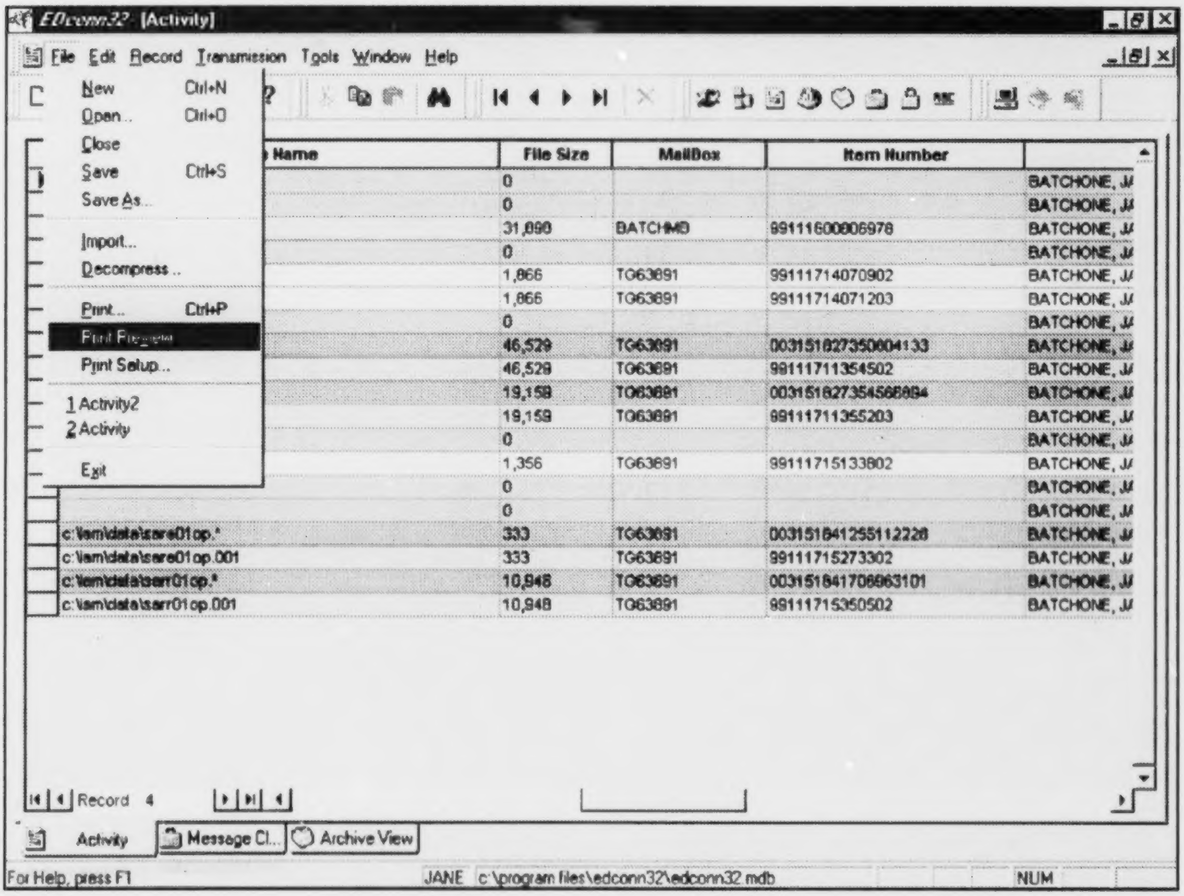


Activity	Project	Cycle	Description	Message Cla
Transmit			Start of Test Transmission	
Transmit			Start of Transmission	
Receive	Title IV WAN		MESSAGE TABLE DISTRIBUTION	MESSAGTB
Transmit			Start of Transmission	
Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL	EAPS01IN
Transmit			Start of Transmission	
Request	CPS	00-01 Data	00-01 ISIR DATA - AUTOMATIC	SARA01OP
Receive	CPS	00-01 Data	00-01 ISIR DATA - AUTOMATIC	SARA01OP
Request	CPS	00-01 Data	00-01 ISIR DATA - ELECTRONIC APPS	EAPS01OP
Receive	CPS	00-01 Data	00-01 ISIR DATA - ELECTRONIC APPS	EAPS01OP
Transmit			Start of Transmission	
Send	CPS	00-01 Data	00-01 CORRECTIONS/DUPLICATES	CORR01IN
Transmit			Start of Transmission	
Transmit			Start of Transmission	
Request	CPS	00-01 Data	00-01 ERRORS-CORRECTIONS/DUPLICATES	SARE01OP
Receive	CPS	00-01 Data	00-01 ERRORS-CORRECTIONS/DUPLICATES	SARE01OP
Request	CPS	00-01 Data	00-01 ISIR DATA-CORRECT/DUPLICATES	SARR01OP
Receive	CPS	00-01 Data	00-01 ISIR DATA-CORRECT/DUPLICATES	SARR01OP

Print the Activity Log

*Select **File/Print Preview** from the menu or click the print preview icon.*

One alternative to keeping a manual data processing log is to use the information stored in the Activity Log. EDconn32 stores all of the information you need. You can easily print or export the information for future reference. In this example we will print a copy of the Activity Log.

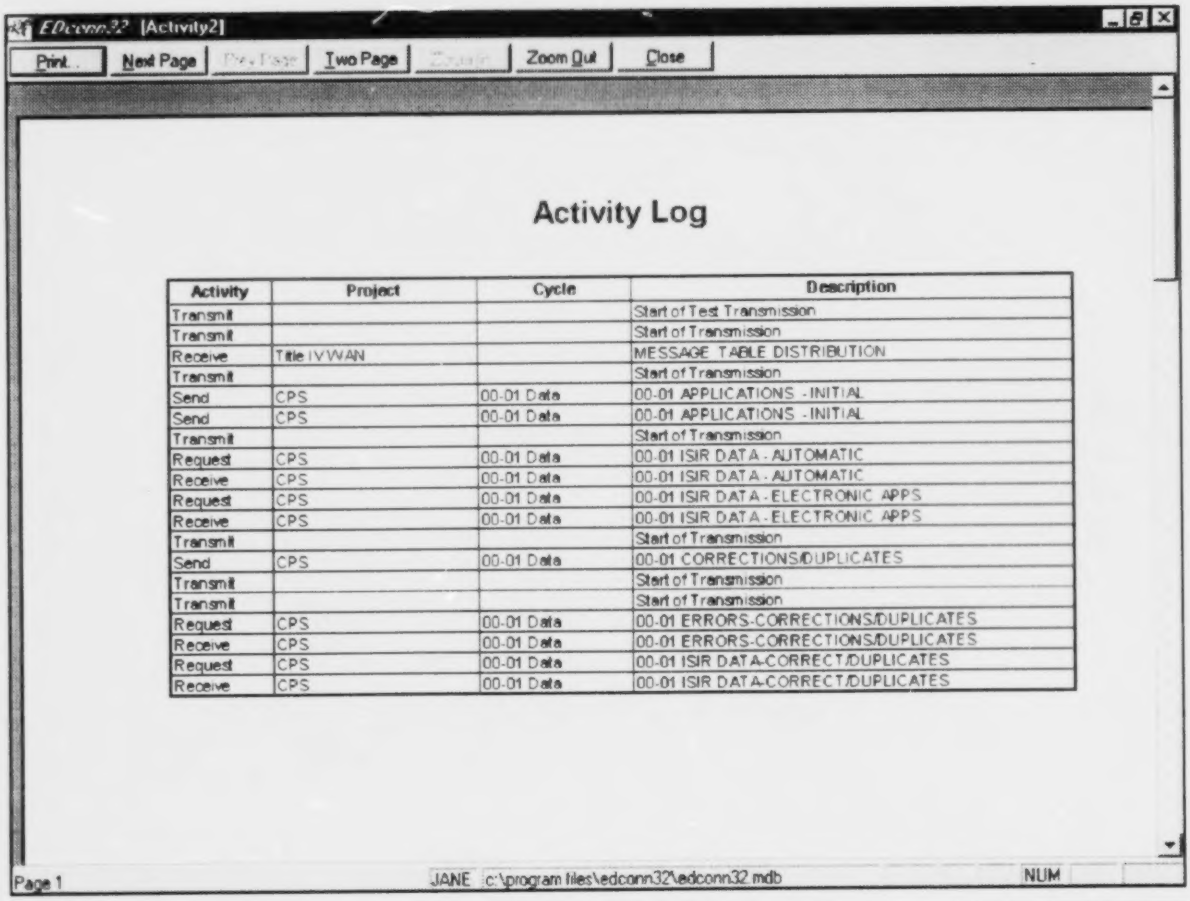

EDconn32 [Activity]
File Edit Record Transmission Tools Window Help
New Ctrl+N
Open... Ctrl+O
Close
Save Ctrl+S
Save As...
Import...
Decompress...
Print... Ctrl+P
Print Preview
Print Setup...
1 Activity2
2 Activity
Exit
Record 4
Activity
Message Cl...
Archive View
For Help, press F1
NUM

Name	File Size	MailBox	Item Number	
	0			BATCHONE, J/
	0			BATCHONE, J/
	31,898	BATCHMB	99111600806978	BATCHONE, J/
	0			BATCHONE, J/
	1,866	TG63691	99111714070902	BATCHONE, J/
	1,866	TG63691	99111714071203	BATCHONE, J/
	0			BATCHONE, J/
	46,529	TG63691	003151627350604133	BATCHONE, J/
	46,529	TG63691	99111711354502	BATCHONE, J/
	19,158	TG63691	003151627354566084	BATCHONE, J/
	19,159	TG63691	99111711355203	BATCHONE, J/
	0			BATCHONE, J/
	1,356	TG63691	99111715133802	BATCHONE, J/
	0			BATCHONE, J/
	0			BATCHONE, J/
c:\iam\data\sare01op.*	333	TG63691	003151641255112228	BATCHONE, J/
c:\iam\data\sare01op.001	333	TG63691	99111715273302	BATCHONE, J/
c:\iam\data\sarr01op.*	10,948	TG63691	003151641706963101	BATCHONE, J/
c:\iam\data\sarr01op.001	10,948	TG63691	99111715350502	BATCHONE, J/

JANE c:\program files\edconn32\edconn32.mdb

The information appears exactly as on the screen. Since the information is stored in a wide landscape table, the print output will take several pages to include all columns.

*Click the **Next Page** button to view more.*

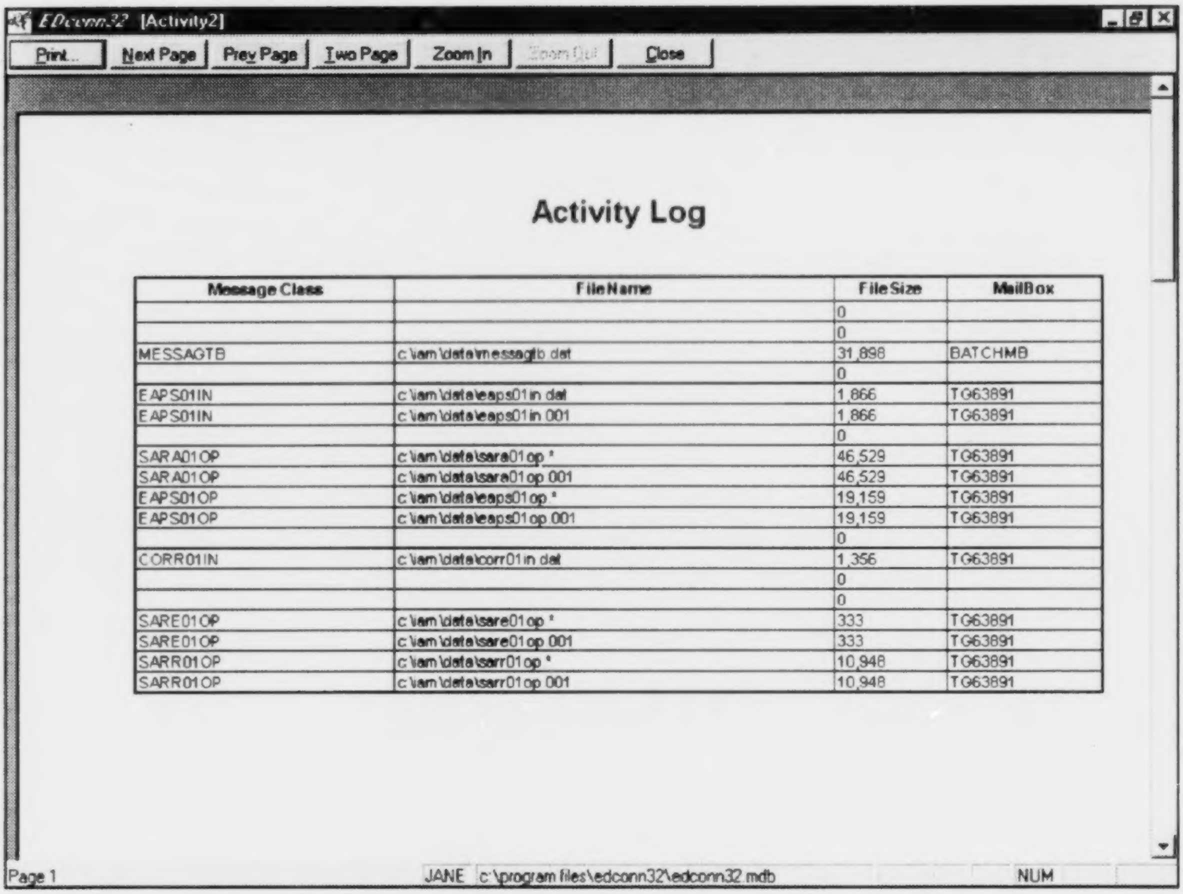


Activity Log

Activity	Project	Cycle	Description
Transmit			Start of Test Transmission
Transmit			Start of Transmission
Receive	Title IV WAN		MESSAGE TABLE DISTRIBUTION
Transmit			Start of Transmission
Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL
Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIAL
Transmit			Start of Transmission
Request	CPS	00-01 Data	00-01 ISIR DATA - AUTOMATIC
Receive	CPS	00-01 Data	00-01 ISIR DATA - AUTOMATIC
Request	CPS	00-01 Data	00-01 ISIR DATA - ELECTRONIC APPS
Receive	CPS	00-01 Data	00-01 ISIR DATA - ELECTRONIC APPS
Transmit			Start of Transmission
Send	CPS	00-01 Data	00-01 CORRECTIONS/DUPLICATES
Transmit			Start of Transmission
Transmit			Start of Transmission
Request	CPS	00-01 Data	00-01 ERRORS-CORRECTIONS/DUPLICATES
Receive	CPS	00-01 Data	00-01 ERRORS-CORRECTIONS/DUPLICATES
Request	CPS	00-01 Data	00-01 ISIR DATA-CORRECT/DUPLICATES
Receive	CPS	00-01 Data	00-01 ISIR DATA-CORRECT/DUPLICATES

BEST COPY AVAILABLE

*Click the **Next Page** button to view more.*

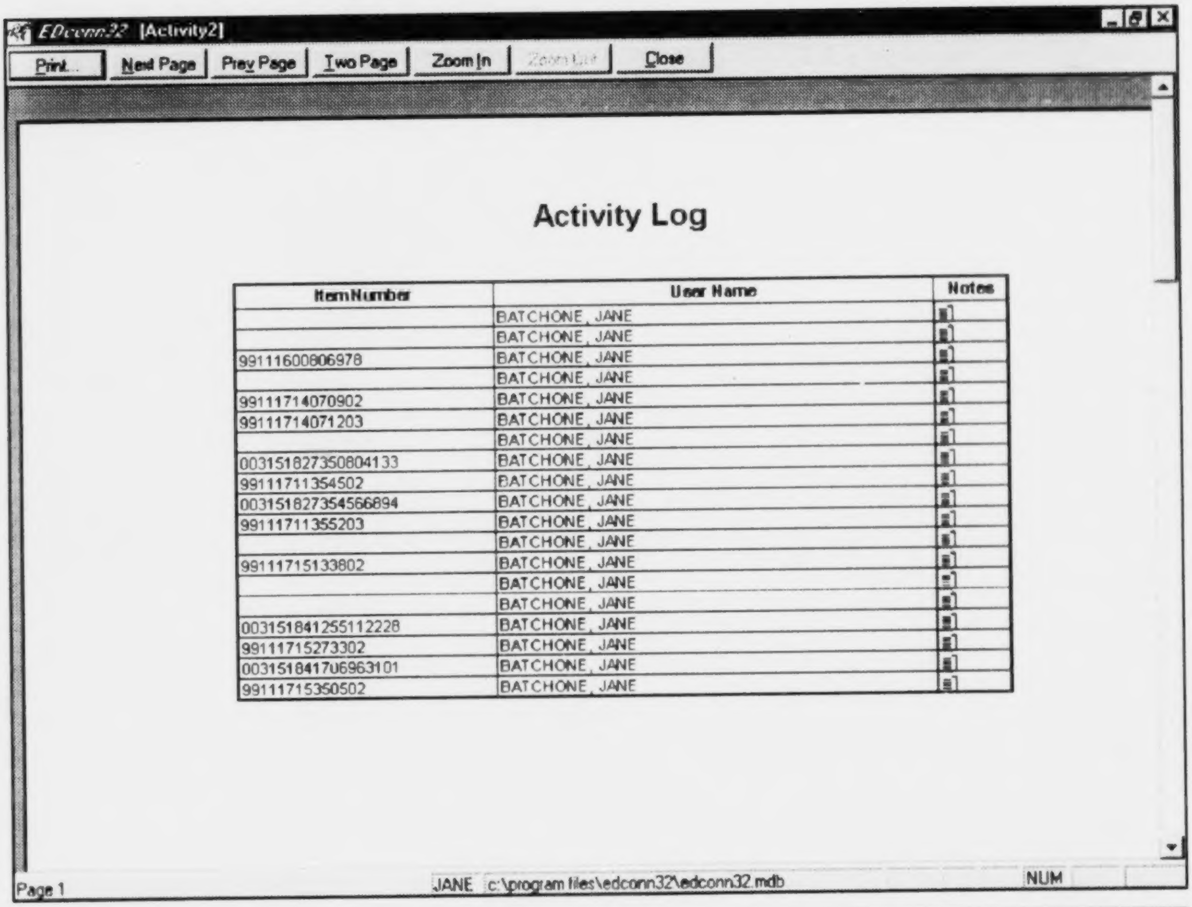


Activity Log

Message Class	FileName	FileSize	MailBox
		0	
		0	
MESSAGTB	c:\iam\data\messagtb.dat	31,898	BATCHMB
		0	
EAPS01IN	c:\iam\data\eaps01in.dat	1,866	TG63891
EAPS01IN	c:\iam\data\eaps01in.001	1,866	TG63891
		0	
SARA01OP	c:\iam\data\sara01op.*	46,529	TG63891
SARA01OP	c:\iam\data\sara01op.001	46,529	TG63891
EAPS01OP	c:\iam\data\eaps01op.*	19,159	TG63891
EAPS01OP	c:\iam\data\eaps01op.001	19,159	TG63891
		0	
CORR01IN	c:\iam\data\corr01in.dat	1,356	TG63891
		0	
		0	
SARE01OP	c:\iam\data\sare01op.*	333	TG63891
SARE01OP	c:\iam\data\sare01op.001	333	TG63891
SARR01OP	c:\iam\data\sarr01op.*	10,948	TG63891
SARR01OP	c:\iam\data\sarr01op.001	10,948	TG63891

Page 1 JANE c:\program files\edconn32\edconn32.mdb NUM

Click the ***Next Page*** *button to view more.*

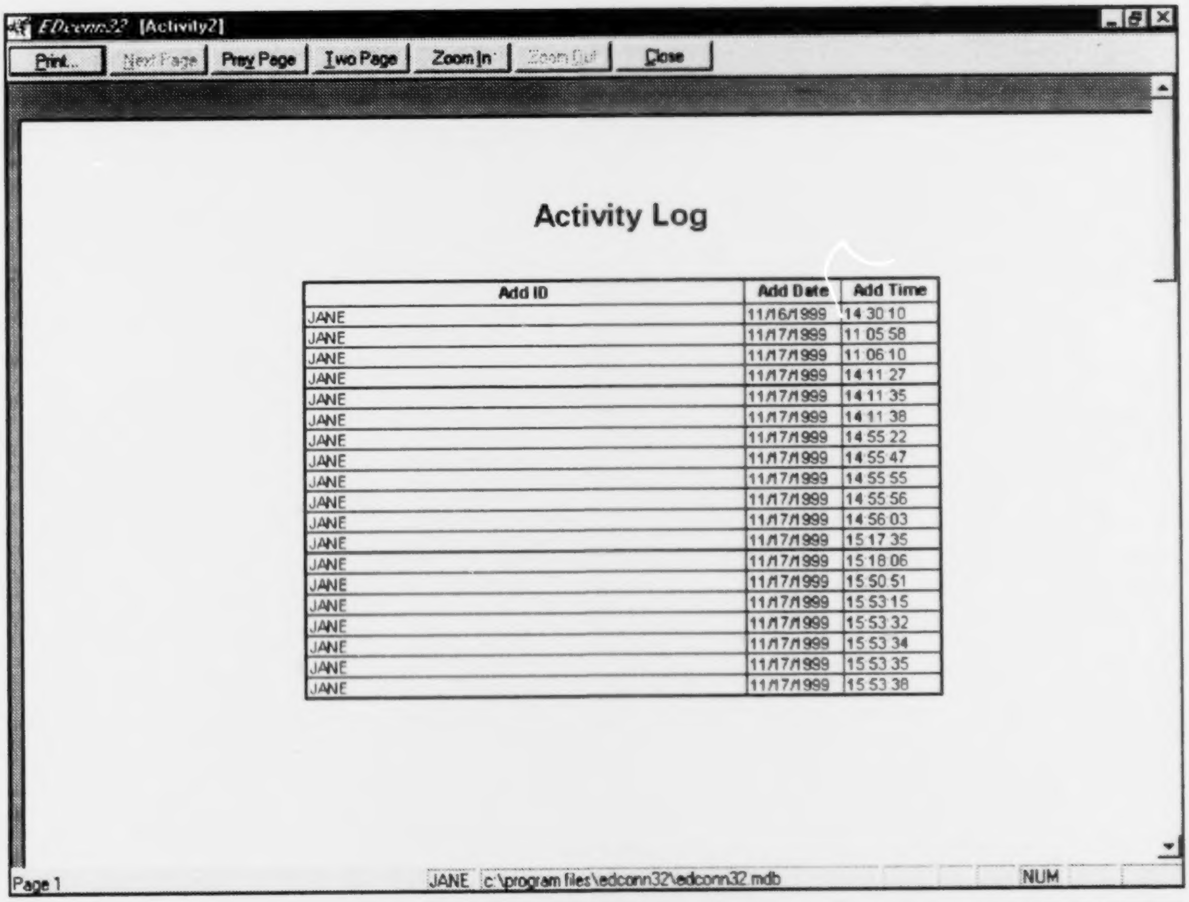

EDconn32 [Activity2]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
JANE
NUM

c:\program files\edconn32\edconn32.mdb

Activity Log

ItemNumber	User Name	Notes
	BATCHONE, JANE	▤
	BATCHONE, JANE	▤
99111600806978	BATCHONE, JANE	▤
	BATCHONE, JANE	▤
99111714070902	BATCHONE, JANE	▤
99111714071203	BATCHONE, JANE	▤
	BATCHONE, JANE	▤
003151827350804133	BATCHONE, JANE	▤
99111711354502	BATCHONE, JANE	▤
003151827354566894	BATCHONE, JANE	▤
99111711355203	BATCHONE, JANE	▤
	BATCHONE, JANE	▤
99111715133802	BATCHONE, JANE	▤
	BATCHONE, JANE	▤
	BATCHONE, JANE	▤
003151841255112228	BATCHONE, JANE	▤
99111715273302	BATCHONE, JANE	▤
003151841706963101	BATCHONE, JANE	▤
99111715350502	BATCHONE, JANE	▤

*This is the last page. Click the **Print** button to print the report.*


EDconn32 [Activity2]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
JANE
c:\program files\edconn32\edconn32.mdb
NUM

Activity Log

Add ID	Add Date	Add Time
JANE	11/16/1999	14:30:10
JANE	11/17/1999	11:05:58
JANE	11/17/1999	11:06:10
JANE	11/17/1999	14:11:27
JANE	11/17/1999	14:11:35
JANE	11/17/1999	14:11:38
JANE	11/17/1999	14:55:22
JANE	11/17/1999	14:55:47
JANE	11/17/1999	14:55:55
JANE	11/17/1999	14:55:56
JANE	11/17/1999	14:56:03
JANE	11/17/1999	15:17:35
JANE	11/17/1999	15:18:06
JANE	11/17/1999	15:50:51
JANE	11/17/1999	15:53:15
JANE	11/17/1999	15:53:32
JANE	11/17/1999	15:53:34
JANE	11/17/1999	15:53:35
JANE	11/17/1999	15:53:38

Lesson 5 Exercise

Scenario:

Today is Wednesday. Just to make sure that you have retrieved all of the batches from your mailbox, you need to send a request for all CPS data for 2000-2001. Another counselor in the office thinks that a batch of ISIRs may be missing, since he created a correction record a week ago that no ISIR has been received for. To satisfy his request, you need to print a copy of the Activity Log. You will be using a simulation of EDconn32 to complete this task.

Exercise Instructions:

The tasks for this exercised are outlined below. You will complete the tasks and answer questions that pertain to those tasks. Read the tasks AND the questions before you begin the exercise! Answers to some of the questions may be a part of the task or involve a computer response.

1. Open and log in to EDconn32.

Step	Action
1	From the taskbar, click **Start/Programs**. Then select the **EDconn32** program group and **Edconn32 (Unit 3, Lesson 3)**
2	Type the User ID: **Jane**.
3	Type the Password: **Jane123**
4	Click **OK**.
5	Click **OK** to close the Tip of the Day.

2. Add a record to the Transmission Queue using manual entry for 2000-2001 CPS data.
3. Transmit the request.
4. Open the Activity Log using the toolbar icon.
5. Review the Activity Log.
6. Record your activity in the Transmission Processing Log.
7. Print the Activity Log.

Step	Action
1	Print a copy of the Activity Log. Select **File/Print Preview** to review the print report.
2	Click the **Zoom In** button two times to view the report.
3	Click the **Next Page** button to view all the pages.
4	Click the **Print** button to send the report to the printer.
5	Click **OK** two times to clear the print boxes.

Lesson 5 Exercise, continued

1. How many files were received from the mailbox?

2. What types of files were received from the mailbox?

3. Can you identify the types of files during the transmission? If not, how?

4. What types of files might you receive if you requested All CPS data?

More Thinking

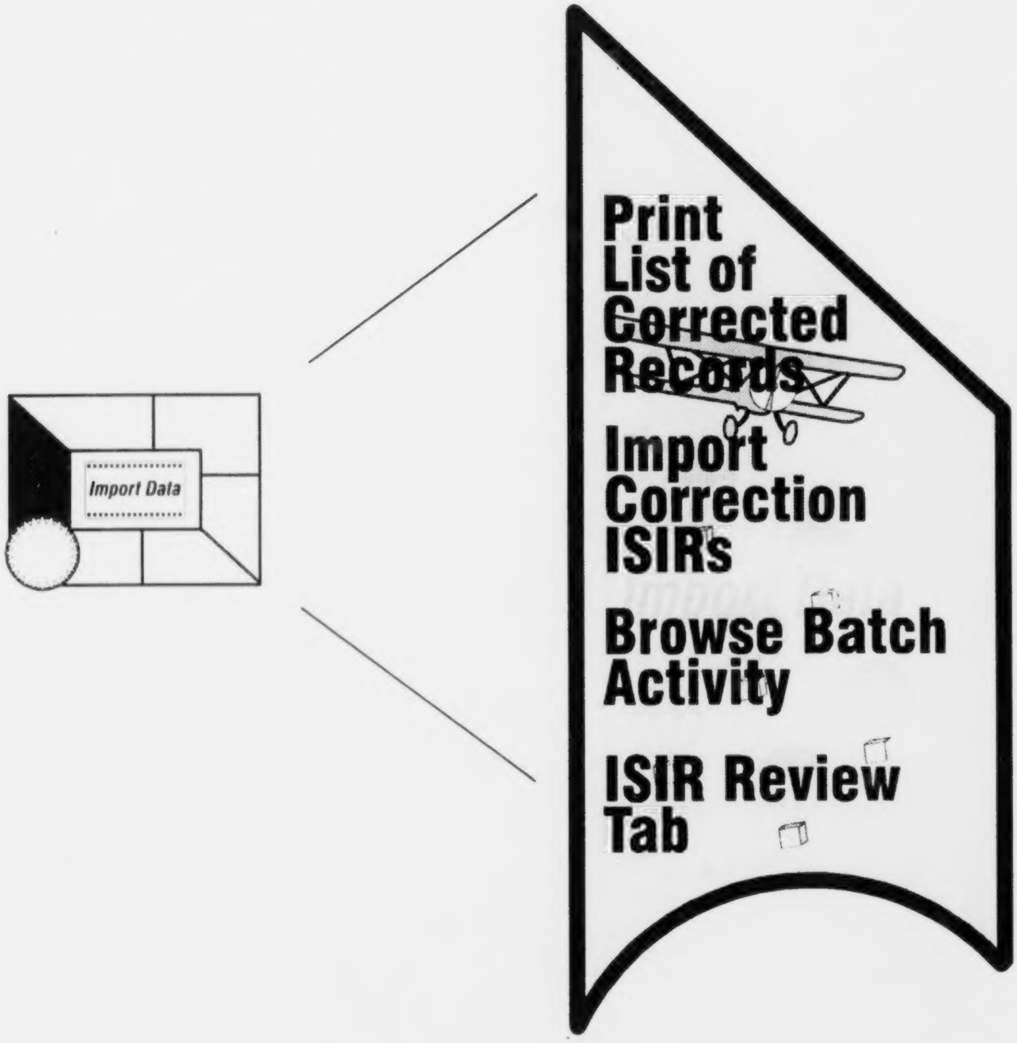
If you receive a 99-00 batch of ISIRs, can the file be imported into the EDExpress v. 6.0?

Lesson 6 – Import Data

Objectives

At the end of this lesson you should be able to:

1. Print a list of corrected records.
2. Import corrected records.
3. Browse batch activity to review correction batch.
4. Use the ISIR review tab to review multiple transactions.

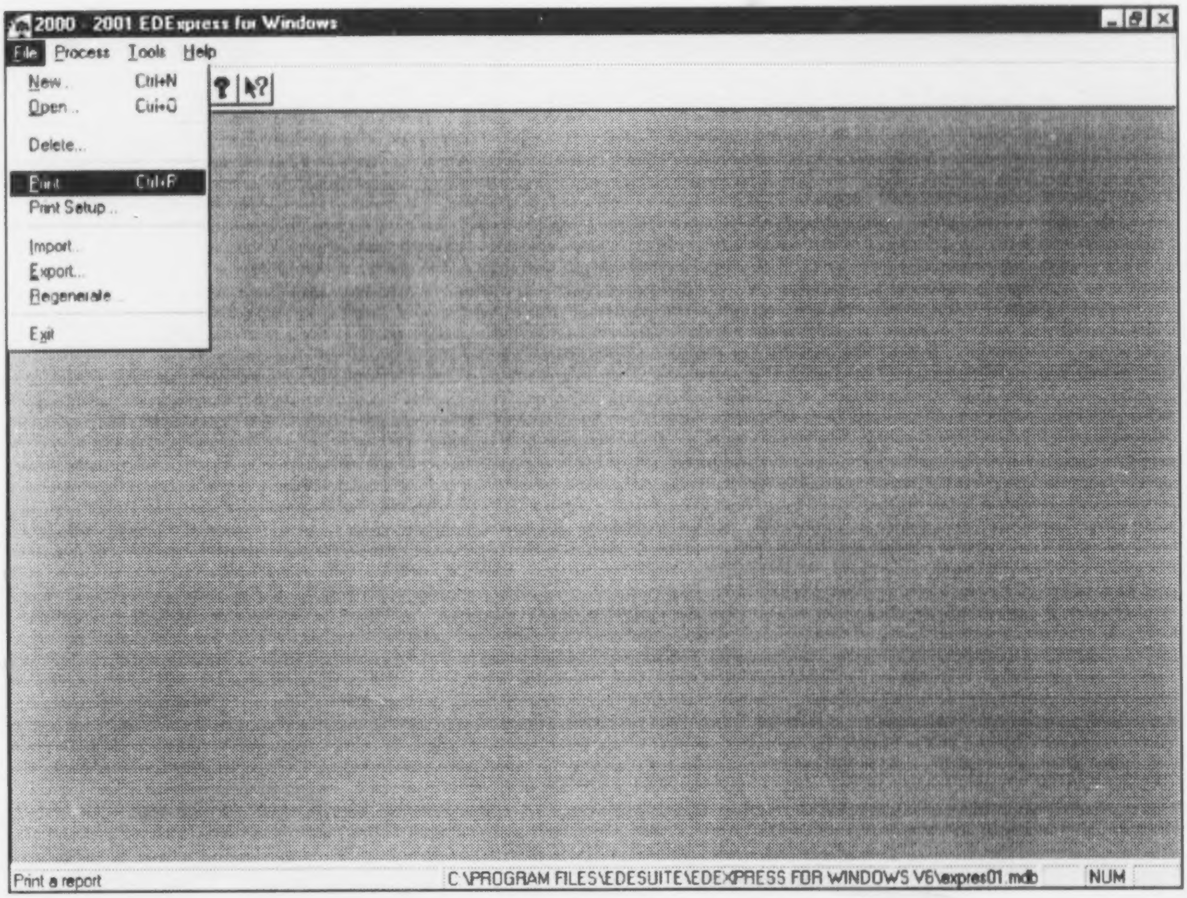

Import Data
Print List of Corrected Records
Import Correction ISIRs
Browse Batch Activity
ISIR Review Tab

Correction Records List

*Select **File/Print** from the menu bar.*

*Click the **App Express** tab.*

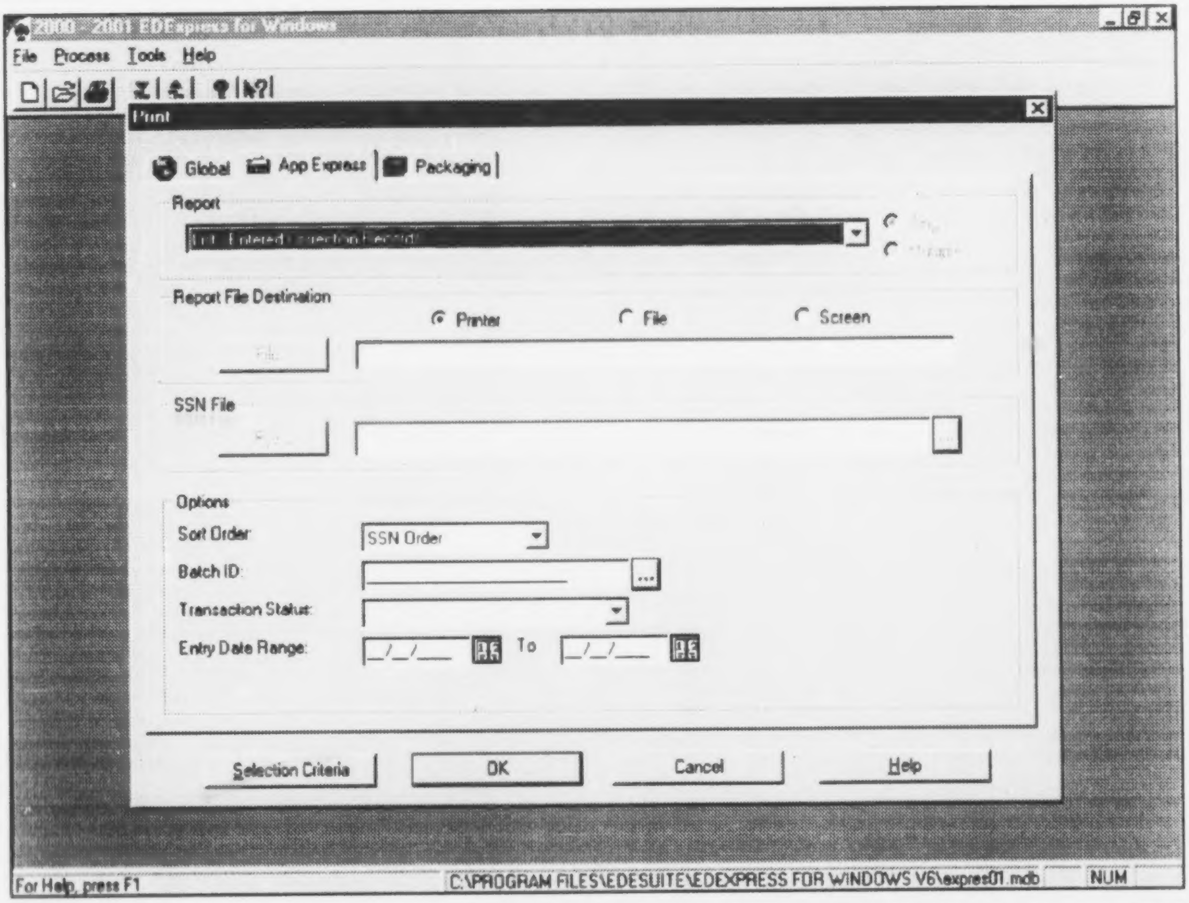
EDExpress provides an option to print a list of the correction records you created. This is useful when identifying processed ISIRs as they are returned.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
New... Ctrl+N
Open... Ctrl+O
Delete...
Print... Ctrl+P
Print Setup...
Import...
Export...
Regenerate...
Exit
Print a report
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Use the down arrow in the Report field to display a list of items you can print.

Tip: Use selection criteria to view specific records and narrow your list.

*Select **List - Entered Correction Records***



2000 - 2001 EDExpress for Windows

Print

Report: List - Entered Correction Records

Report File Destination: ● Printer ○ File ○ Screen

Options

Sort Order: SSN Order

Batch ID:

Transaction Status:

Entry Date Range: __/__/____ To __/__/____

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

File
Process
Tools
Help
Global
App Express
Packaging
SSN File
Selection Criteria
OK
Cancel
Help
NUM

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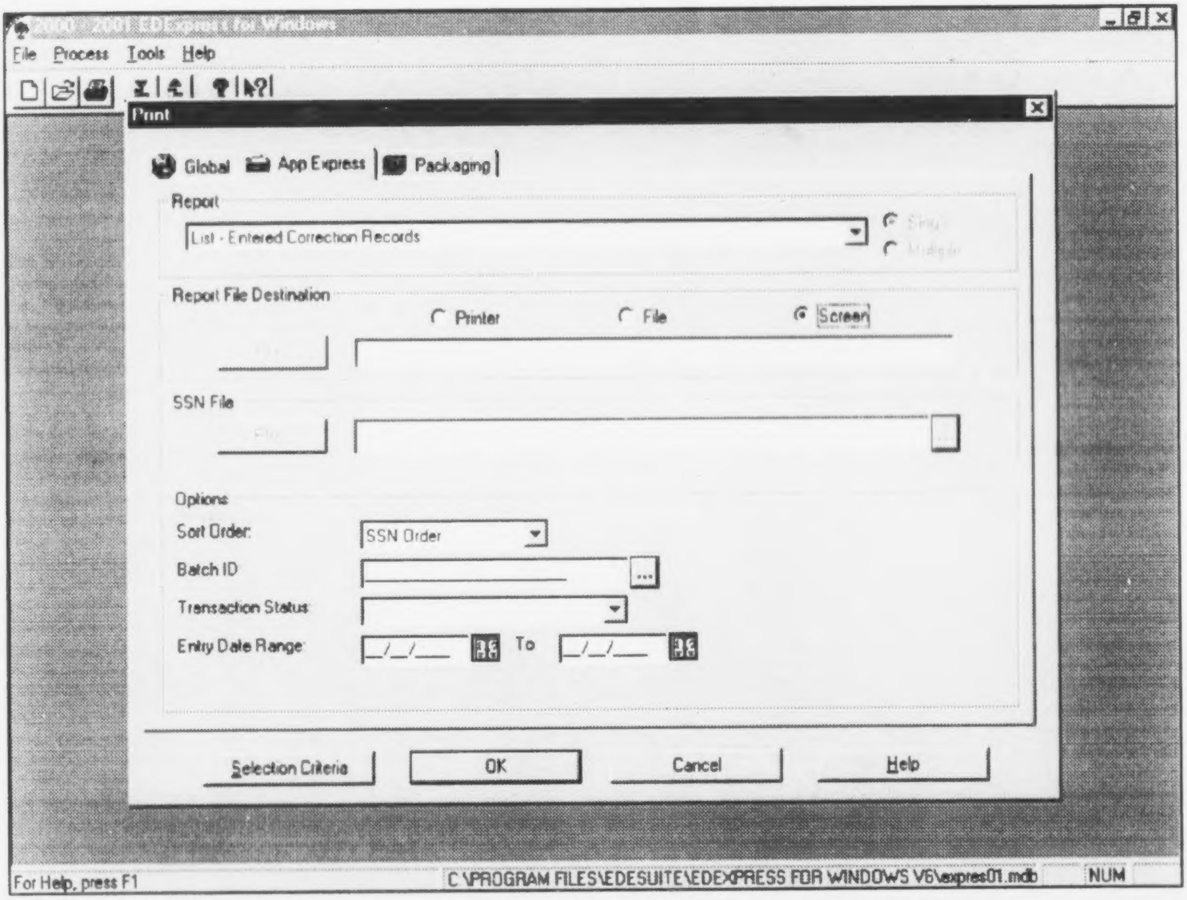
*Click **OK** to generate the report*

This report will be sent to the screen and will appear in the default SSN sort order.


2000-2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Report: List - Entered Correction Records ● Single ○ Multiple

Report File Destination: ○ Printer ○ File ● Screen

SSN File:

Options

Sort Order: SSN Order

Batch ID:

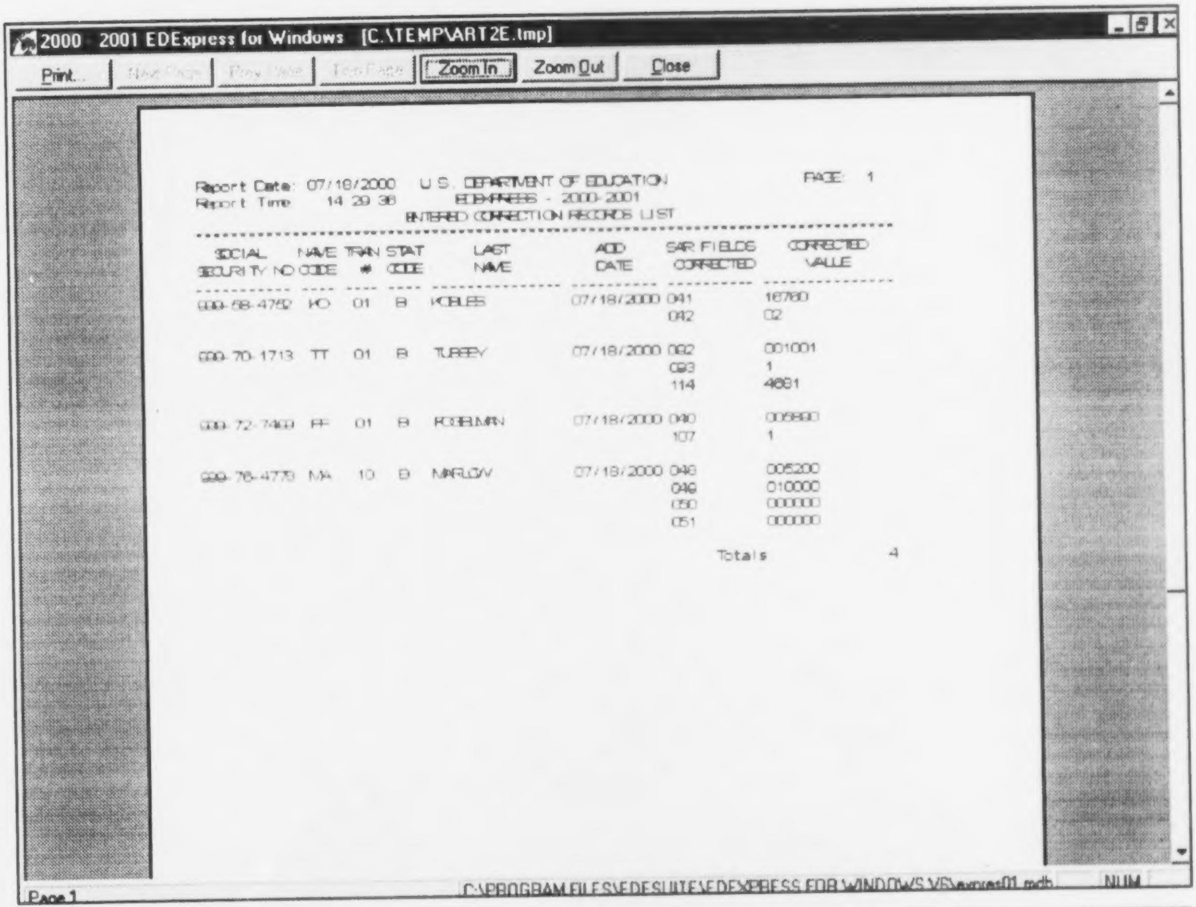
Transaction Status:

Entry Date Range: _/_/_ To _/_/_

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

The report includes the number of records corrected as well as identifying the the corrected field(s) and the corrected value(s).

*Click **Close** when you are finished viewing the report*


2000 - 2001 EDExpress for Windows [C:\TEMP\ART2E.tmp]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

```
Report Date: 07/18/2000   U.S. DEPARTMENT OF EDUCATION               PAGE: 1
Report Time    14 29 38         EDEXPRESS - 2000-2001
                          ENTERED CORRECTION RECORDS LIST
------------------------------------------------------------------------------
  SOCIAL      NAME TRAN STAT       LAST            ADD      SAR FIELDS  CORRECTED
SECURITY NO   CODE  #   CODE       NAME            DATE      CORRECTED    VALUE
-----------  ----  ----  ----  ---------------  ----------  ----------  ----------
999-58-4752   KO   01    B     KOBLES           07/18/2000  041         16780
                                                            042         02

999-70-1713   TT   01    B     TURBEY           07/18/2000  092         001001
                                                            093         1
                                                            114         4681

999-72-7469   FF   01    B     FOGELMAN         07/18/2000  040         005880
                                                            107         1

999-78-4778   MA   10    B     MARLOW           07/18/2000  048         005200
                                                            049         010000
                                                            050         000000
                                                            051         000000

                                                       Totals                4
```

Importing Corrected ISIRs

*Click the **Import** button on the tool bar*

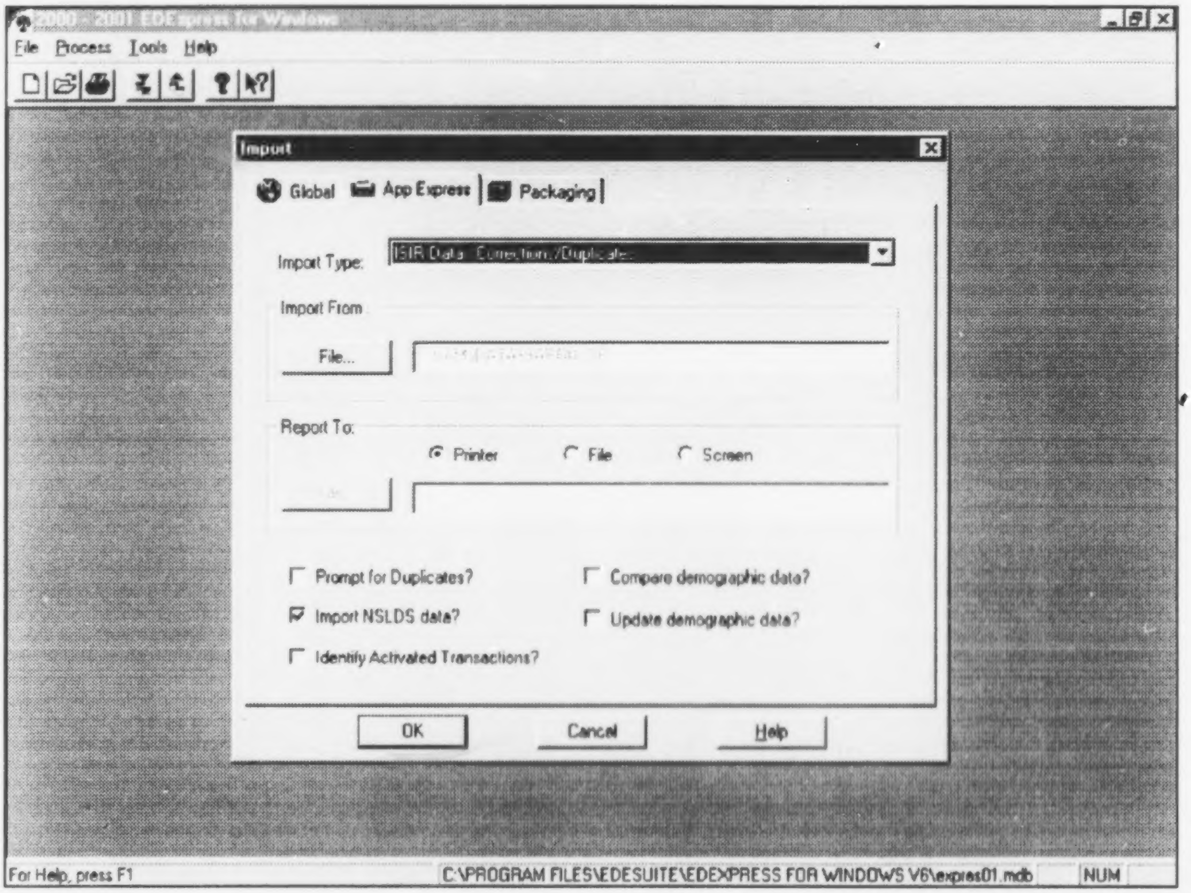
*Select **ISIR Data - Corrections/Duplicates** as the Import Type*

*Click the **Import From File** button to locate the file*

Now you are ready to import the ISIRs from the processed corrections you submitted. The import process for correction ISIRs is the same as electronic ISIRs and automatic ISIRs.

NEW!

A new field, Identify Activated Transactions, notifies users when a new ISIR is imported for a student that already has an active transaction.


2000 - 2001 EDExpress for Windows
File Process Tools Help
Import
Global
App Express
Packaging
File...
OK
Cancel
Help

Import Type: ISIR Data - Corrections/Duplicates

Report To: ● Printer ○ File ○ Screen

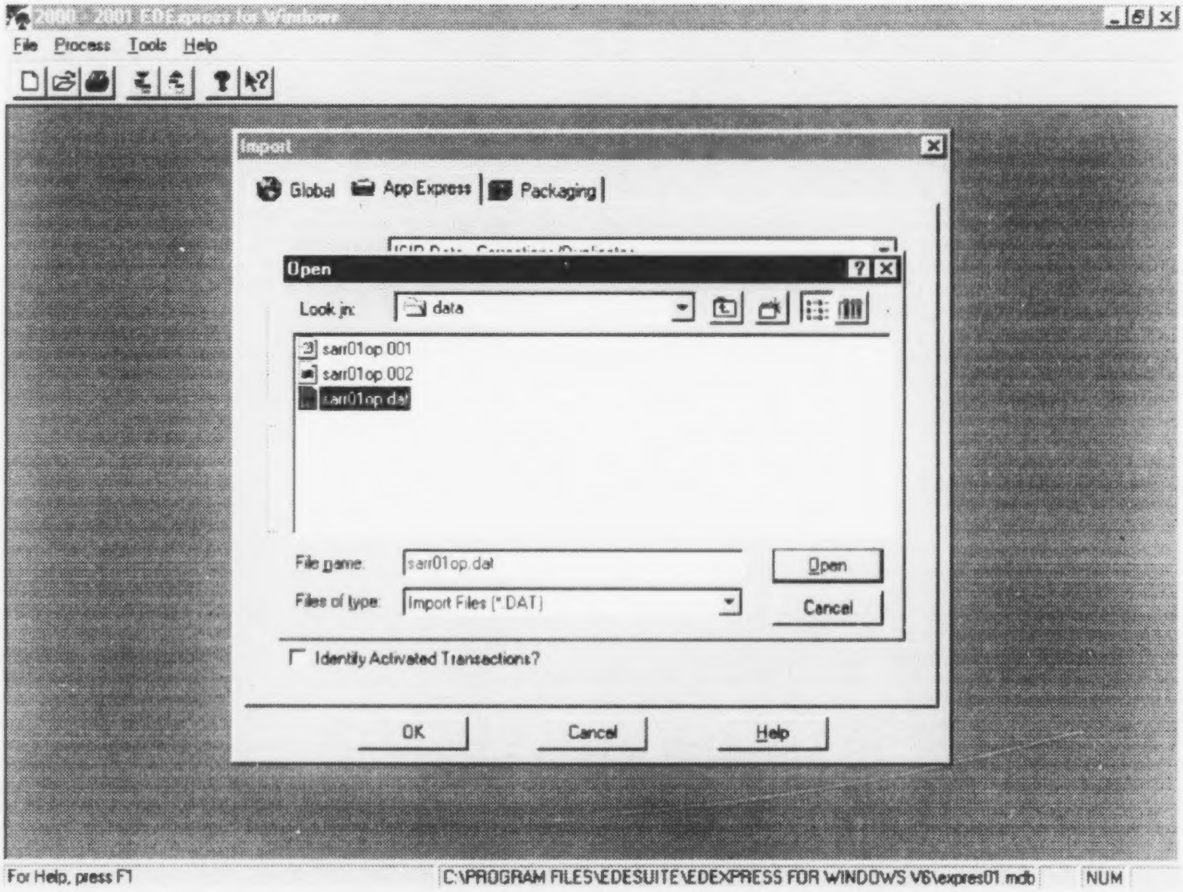
☐ Prompt for Duplicates?
☑ Import NSLDS data?
☐ Identify Activated Transactions?
☐ Compare demographic data?
☐ Update demographic data?

For Help, press F1 | C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb | NUM

Select the desired file

Click ***Open***

Click on the ***SARR01OP.dat*** *file*



2000 - 2001 EDExpress for Windows

Import

ISIR Data - Corrections/Duplicates

Open

Look in: data

sarr01op.001
sarr01op.002
sarr01op.dat

File name: sarr01op.dat

Files of type: Import Files (*.DAT)

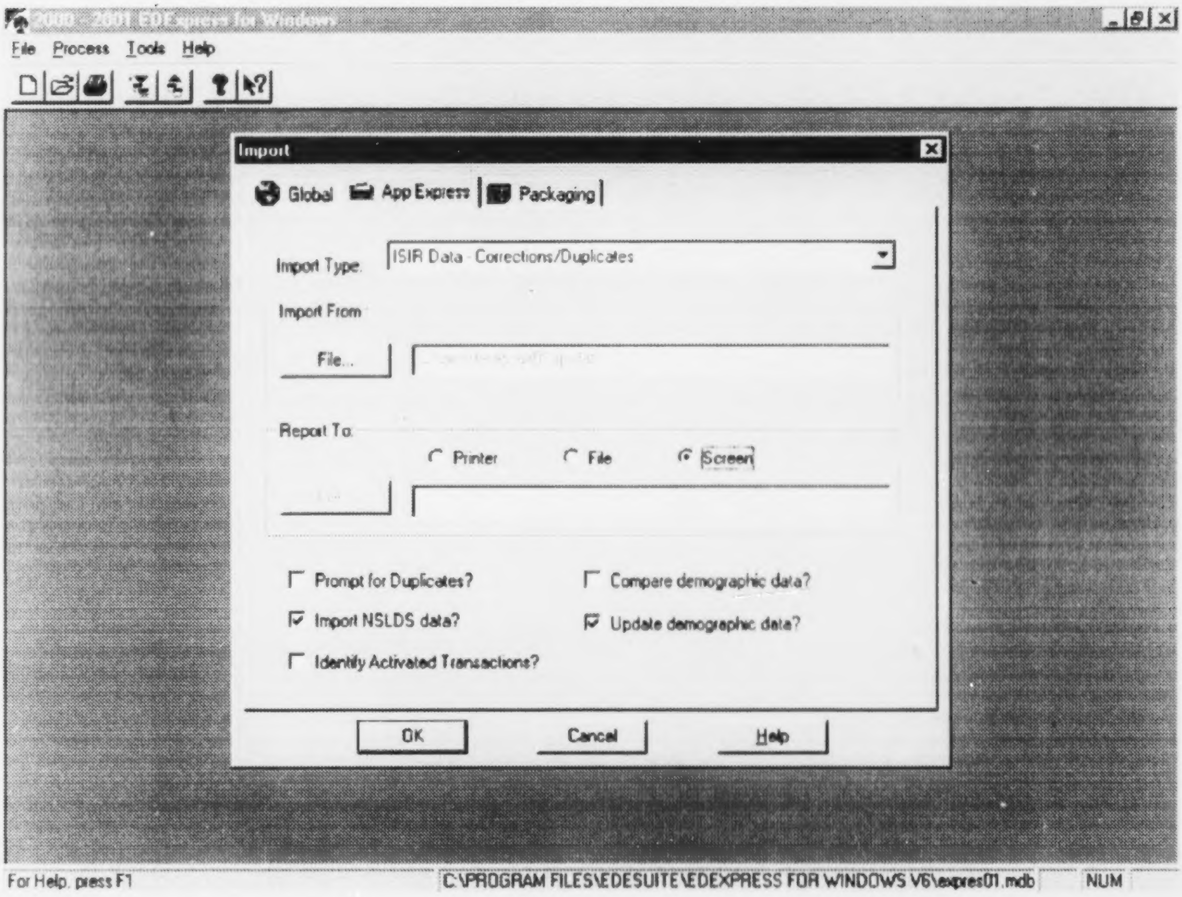
☐ Identify Activated Transactions?

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

File
Process
Tools
Help
Global
App Express
Packaging
Open
Cancel
OK
Cancel
Help
NUM

*Click **OK***	Select the Screen option to view the Import Edit Report on the screen



2000 - 2001 EDExpress for Windows
File Process Tools Help
Import
Global App Express Packaging
File...
OK Cancel Help
For Help, press F1
NUM

Import Type: ISIR Data - Corrections/Duplicates

Import From

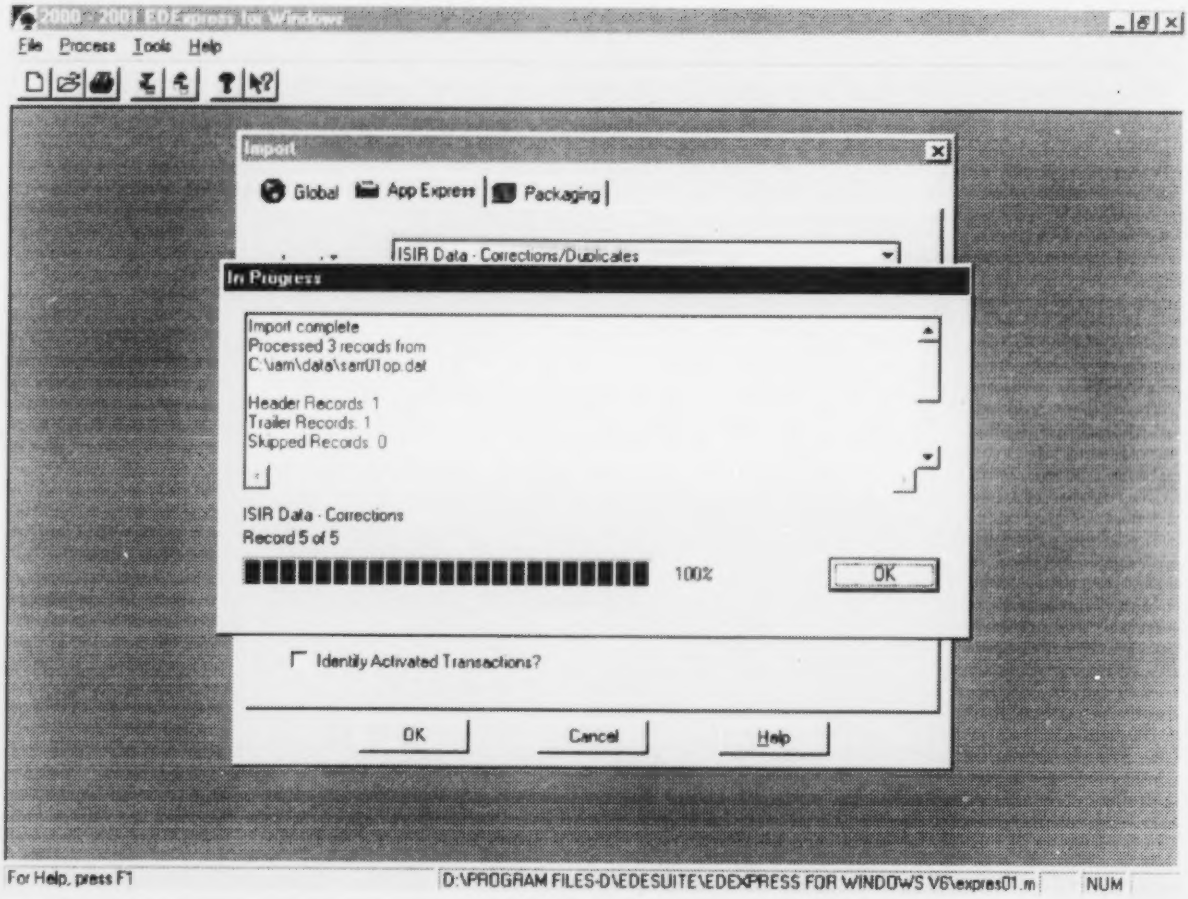
Report To: ○ Printer ○ File ● Screen

☐ Prompt for Duplicates?
☑ Import NSLDS data?
☐ Identify Activated Transactions?
☐ Compare demographic data?
☑ Update demographic data?

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

This box indicates that there are three ISIR data records in this batch. You must compare this to the correction batch you created.

Click OK to continue.



2000 - 2001 EDExpress for Windows
File Process Tools Help
Import
Global
App Express
Packaging
ISIR Data - Corrections/Duplicates
In Progress

```
Import complete
Processed 3 records from
C:\iam\data\sarr01op.dat

Header Records: 1
Trailer Records: 1
Skipped Records: 0
```

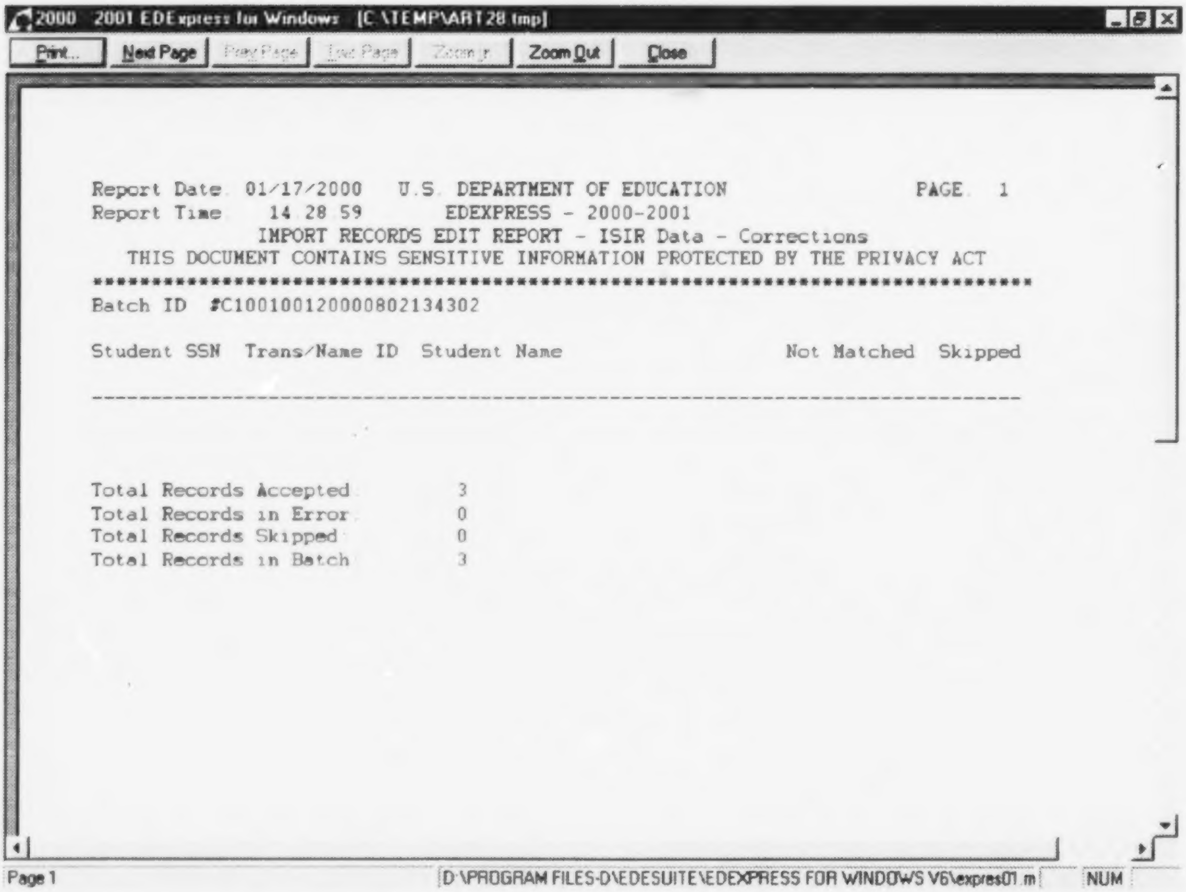
ISIR Data - Corrections
Record 5 of 5
100%

OK
☐ Identify Activated Transactions?
OK
Cancel
Help
For Help, press F1
D:\PROGRAM FILES-D\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.m
NUM

*Click **Close** when you are finished viewing the report.*

The Edit Report indicates that three records were added to the database.

Note the batch ID. This is for your processing log.

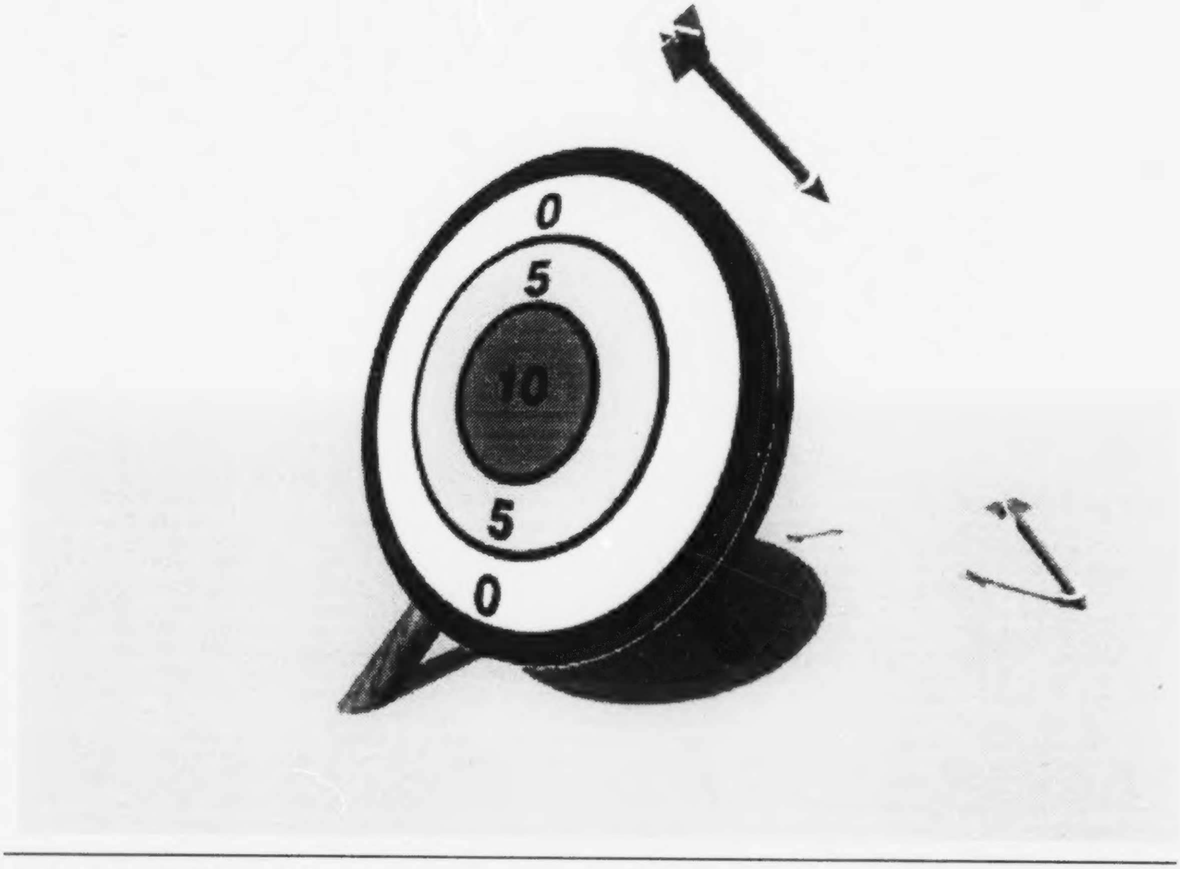

2000 2001 EDExpress for Windows [C:\TEMP\ART28.tmp]
Print...
Next Page
Prev Page
Last Page
Zoom In
Zoom Out
Close
Page 1
D:\PROGRAM FILES-D\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.m
NUM

```
Report Date: 01/17/2000   U.S. DEPARTMENT OF EDUCATION              PAGE: 1
Report Time:   14:28:59       EDEXPRESS - 2000-2001
              IMPORT RECORDS EDIT REPORT - ISIR Data - Corrections
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
********************************************************************************
Batch ID  #C100100120000802134302

Student SSN  Trans/Name ID  Student Name                  Not Matched  Skipped

-------------------------------------------------------------------------------


Total Records Accepted:        3
Total Records in Error:        0
Total Records Skipped:         0
Total Records in Batch:        3
```

EDE Rejects

EDE rejects include field errors and batch rejects. In order to resolve rejected data, you must view the EDE error files, correct the data, and resubmit. To view the EDE error files, import the data into EDExpress and review the Import Edit report. Batch rejects are identified by their message classes and appear on these reports. Message classes include DUPE01OP, EAPR01OP, EREP01OP, RAPR01OP, and SARE01OP. The Import Edit reports provide the reject reason and the field numbers for errors on field-specific data.

Note: EDExpress users will rarely experience any of the problems demonstrated because the software contains edits that prevent inaccurate or missing data from being transmitted.

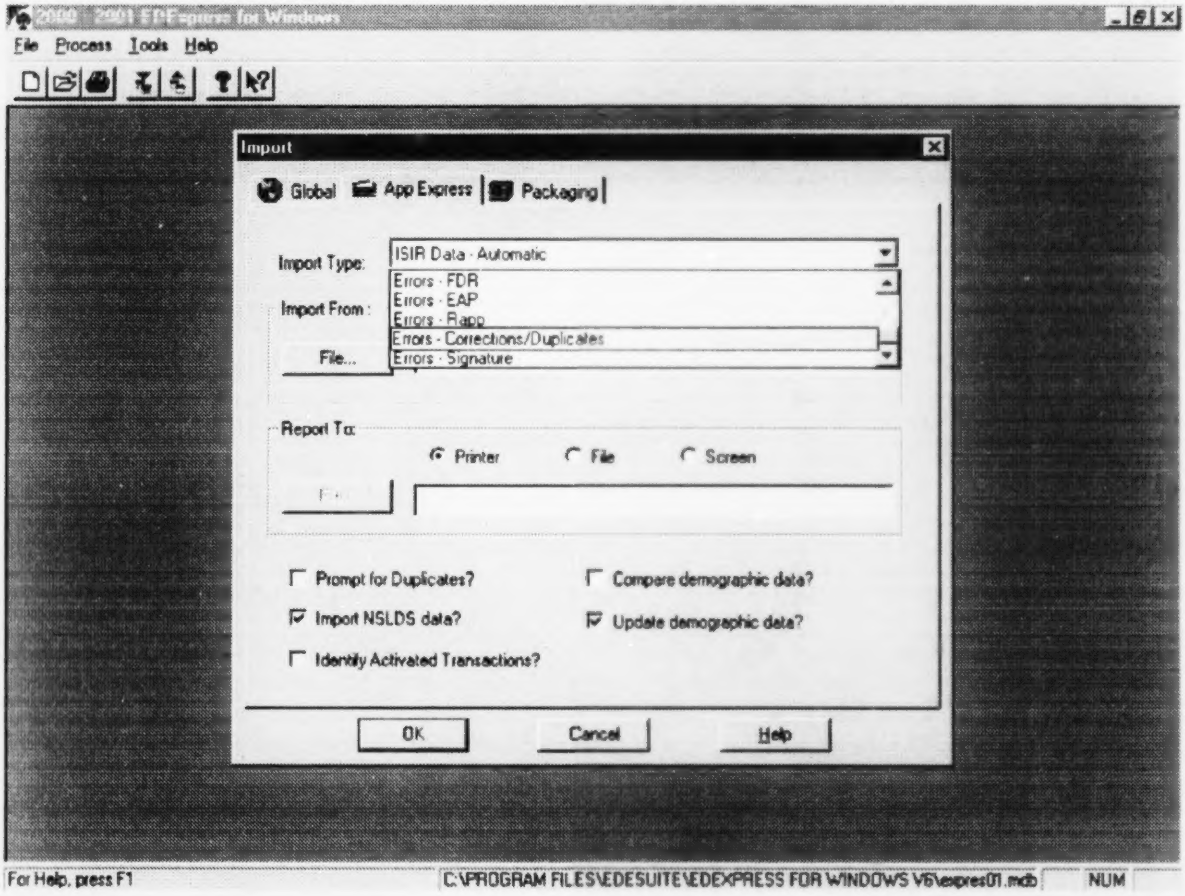


*Click **File/Import***

*Click the down arrow in the **Import Type** field to display a list of files to import.*

*To select the error report, click on **Errors-Corrections/Duplicates***

To view the batch or record errors, complete the following steps.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
File...
OK
Cancel
Help
For Help, press F1
NUM

Import Type: ISIR Data - Automatic

Errors - FDR
Errors - EAP
Errors - Rapp
Errors - Corrections/Duplicates
Errors - Signature

Import From:

Report To: ● Printer ○ File ○ Screen

☐ Prompt for Duplicates?
☑ Import NSLDS data?
☐ Identify Activated Transactions?
☐ Compare demographic data?
☑ Update demographic data?

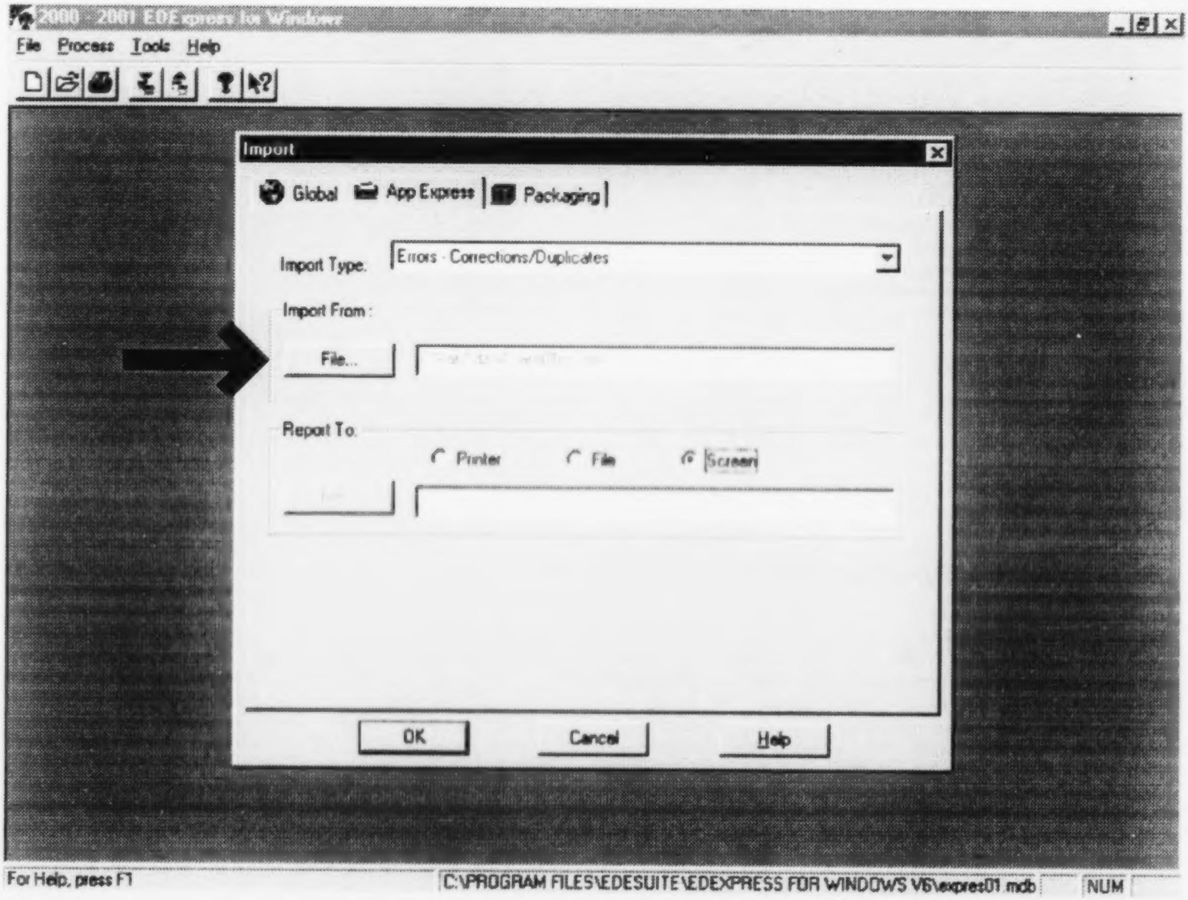
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

*Click on the **file** button in the **Import From** field and select the **SARE01OP** file to be imported.*

*Click **Open**.*

*Select **Printer, File, or Screen** as the error report's destination.*

*Click **OK**.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Import
Global
App Express
Packaging
File...
Printer
File
OK
Cancel
Help
NUM

Import Type: Errors - Corrections/Duplicates

Import From:

Report To: ○ Printer ○ File ● Screen

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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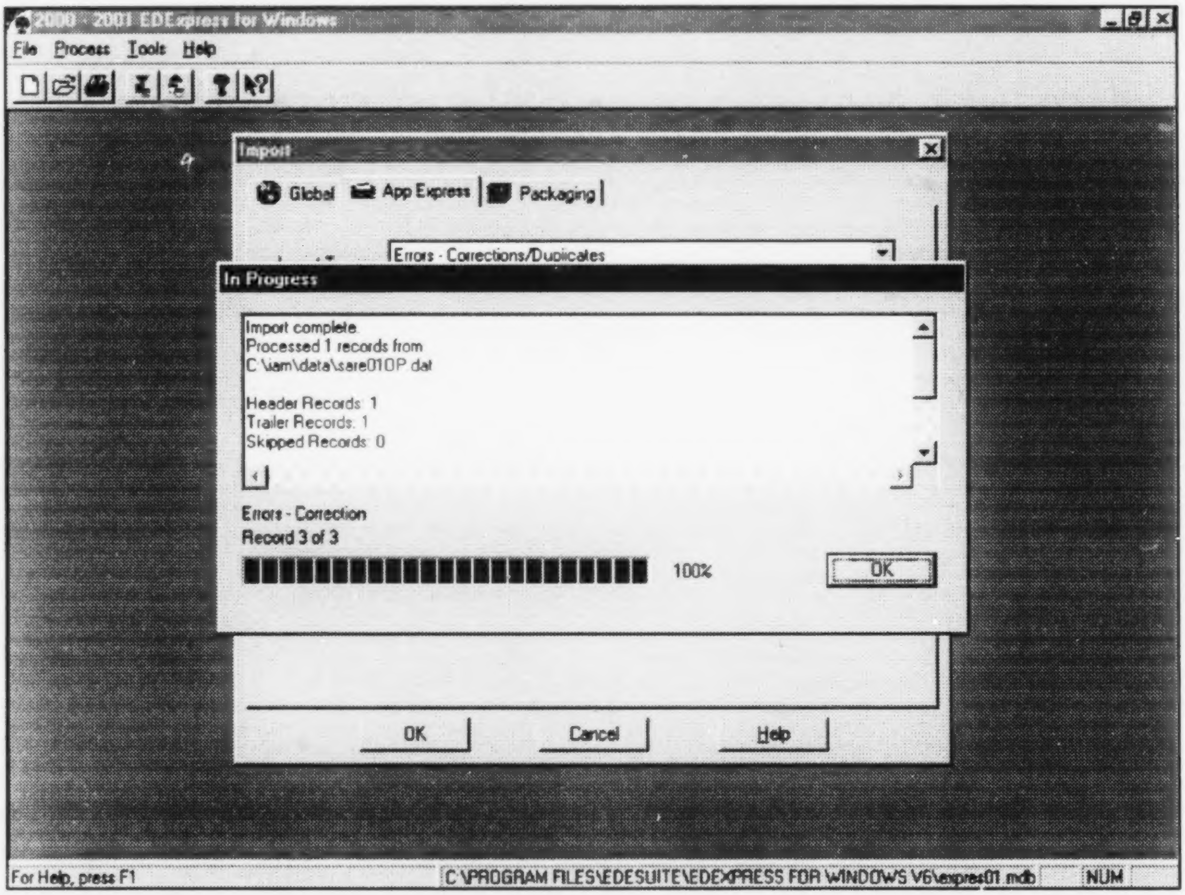
Use the scroll bar to view all the statistics.

The batch report displays statistics about the imported data, such as the number of records in the batch, the number of processed records, and the batch type.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
In Progress
OK
OK
Cancel
Help
For Help, press F1
NUM

Errors - Corrections/Duplicates

```
Import complete.
Processed 1 records from
C:\iam\data\sare01OP.dat

Header Records: 1
Trailer Records: 1
Skipped Records: 0
```

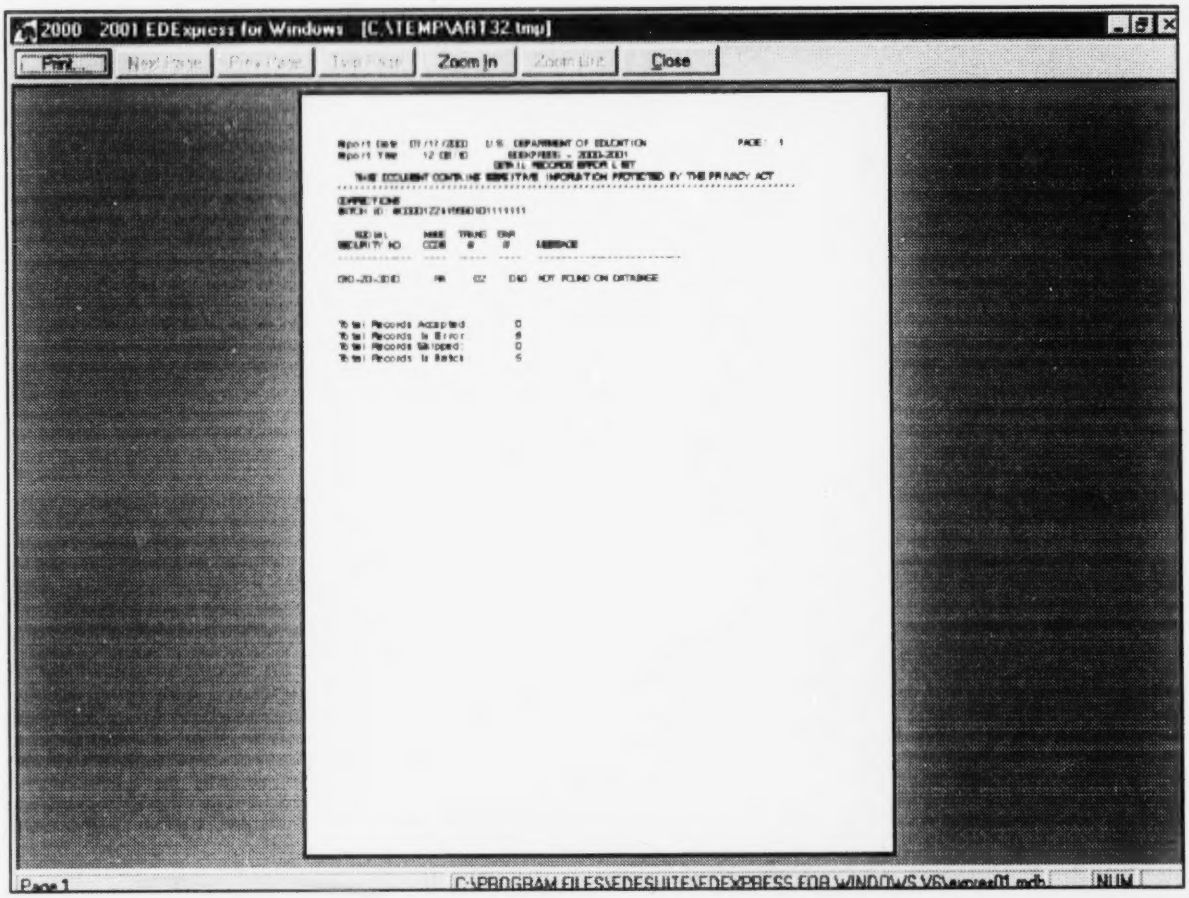
Errors - Correction
Record 3 of 3
100%

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

If you choose to send the error report to the screen, you will see the batch data for the rejected records.

The Detail Records Error List displays the records affected, the batch ID in question, and the reason for the reject (message column).

Click on the ***Close*** *button when you have finished viewing the report.*

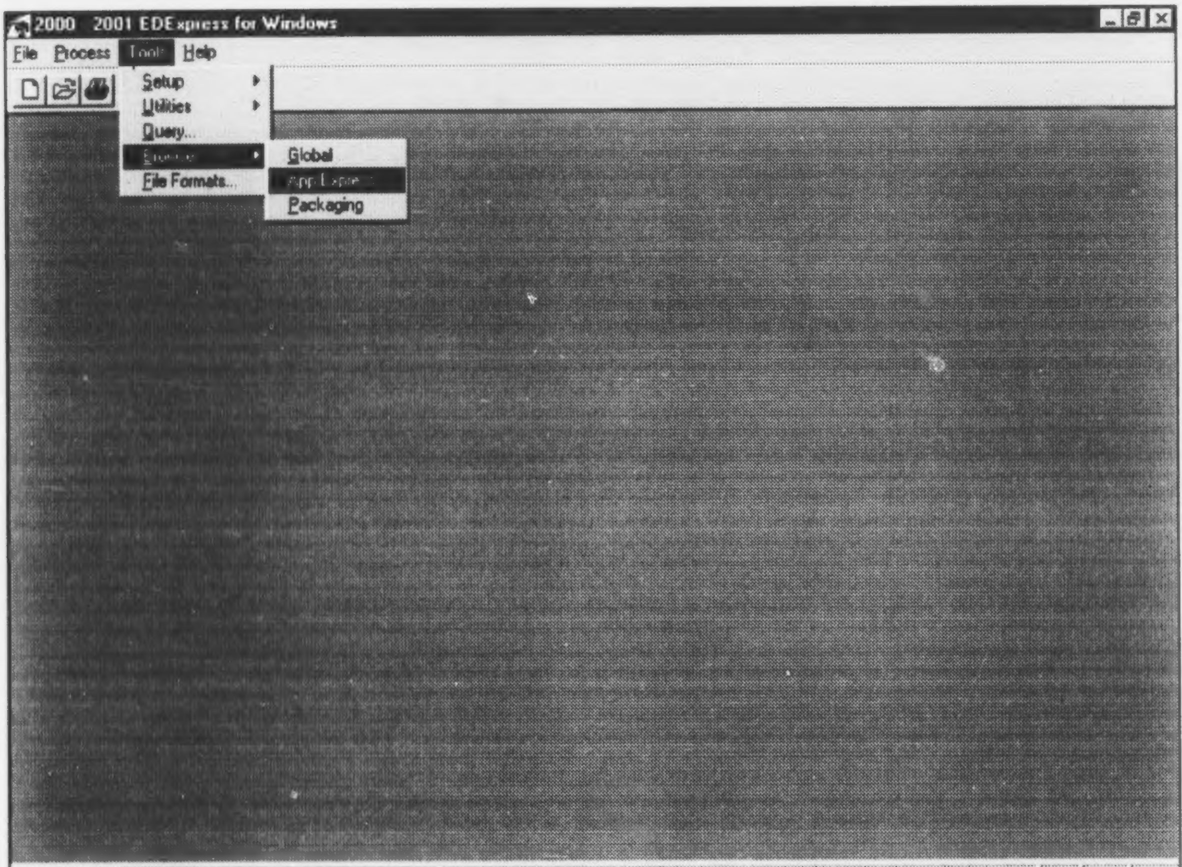

2000 2001 EDExpress for Windows [C:\TEMP\ART32.tmp]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

246

Browsing Batch Activity

Click ***Tools/Browse/ App Express*** *on the menu bar.*

When you look at the batch activity database at this point, you will see the import entry for the batch you just imported.

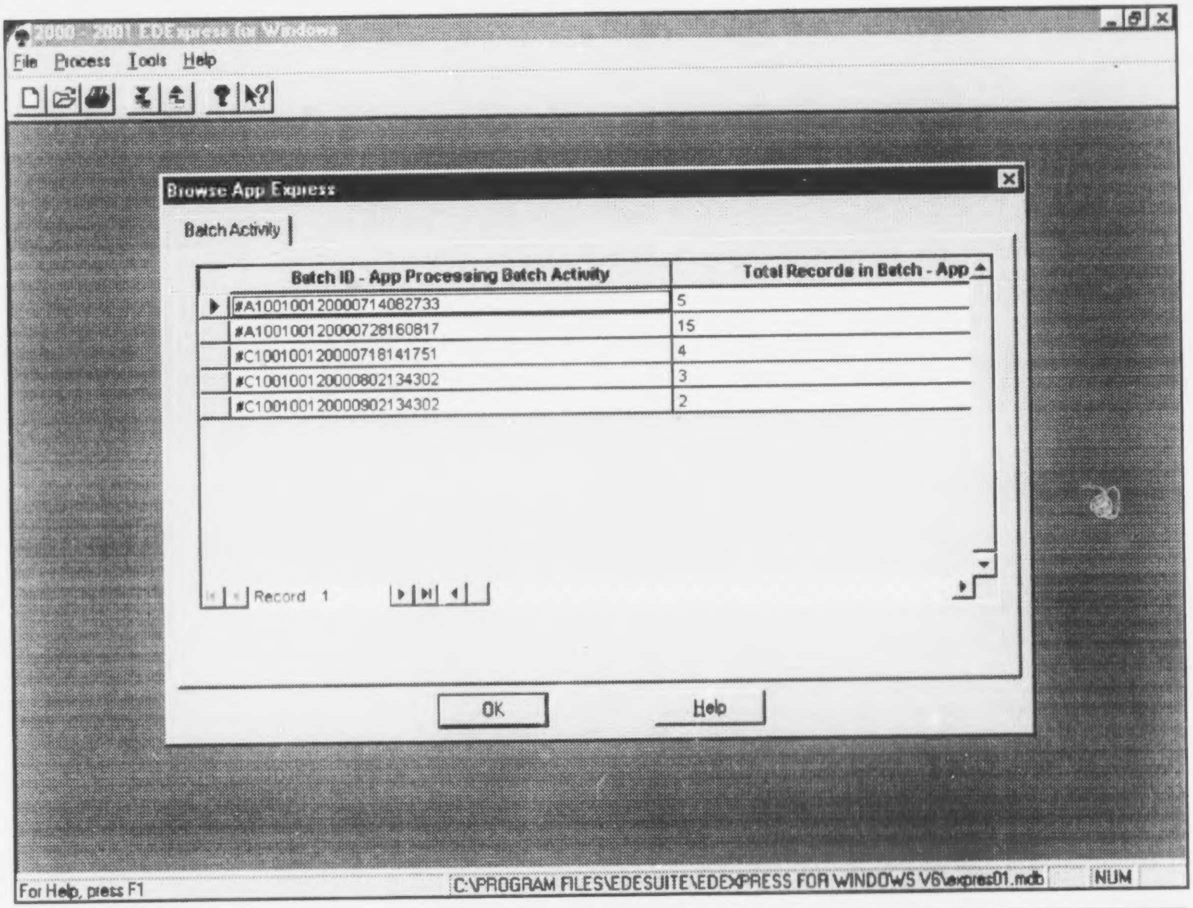

2000 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

In this example, four new batches have been added. The batch ID for the export and import batches are the same.

The batch ID for the export and import batches are the same.

Click the right horizontal scroll bar to view more information.

Click ***OK***


2000 - 2001 EDExpress for Windows
File Process Tools Help
Browse App Express
Batch Activity
Record 1
OK
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Batch ID - App Processing Batch Activity	Total Records in Batch - App
#A10010012000071 4082733	5
#A10010012000072 8160817	15
#C10010012000071 8141751	4
#C10010012000080 2134302	3
#C10010012000090 2134302	2

Printing a List of Corrected ISIRs

*Select **File/Print** from the menu bar.*

*Click **App Express and select List - Processed ISIRs** in the Report field.*

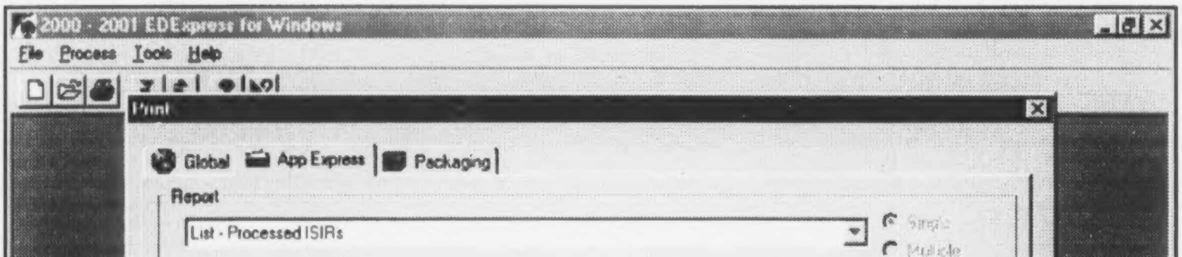
*Since you only want to see the records in the correction batch, enter the batch ID in the **Batch ID** field.*

*Click **OK**.*

Now you probably want to see what students are included in the specific batch. You can print a list of processed ISIRs. Only records from the correction batch are printed.

In this example, we want to print by batch number.

Tip: Uncheck the comments boxes if you do not want to print comment codes.


2000 - 2001 EDExpress for Windows
File Process Tools Help
Print
Global
App Express
Packaging
Single
Multiple
File...
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Report: List - Processed ISIRs

Report File Destination: ● Printer ○ File ○ Screen

SSN File

Options

Sort Order: SSN Order

Batch ID: #C100100120000802134302

Different Current/Original SSN? ☐

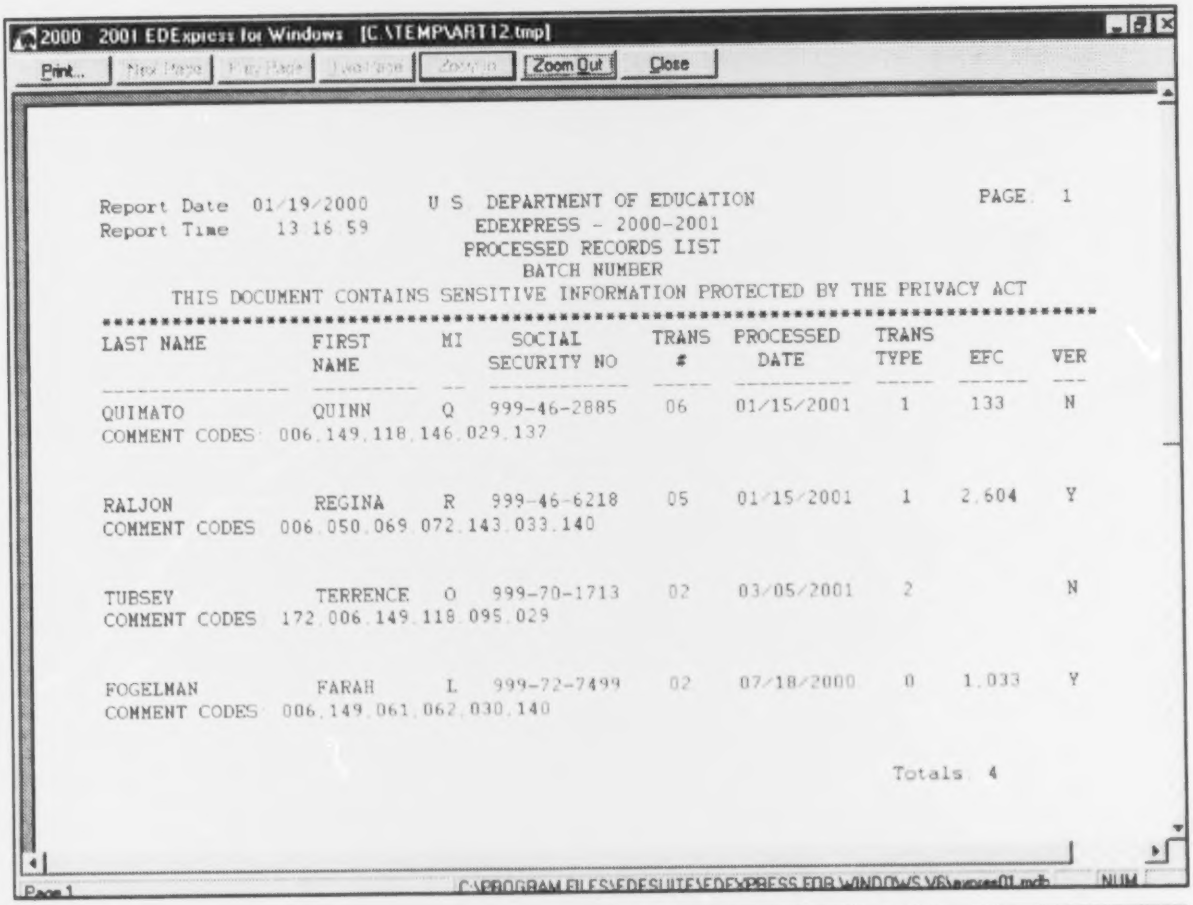
Print FAA Comments? ☑

Print SAR Comments? ☑

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

The Processed Records List is displayed.

*Click **Close** when you are finsihed viewing thereport*

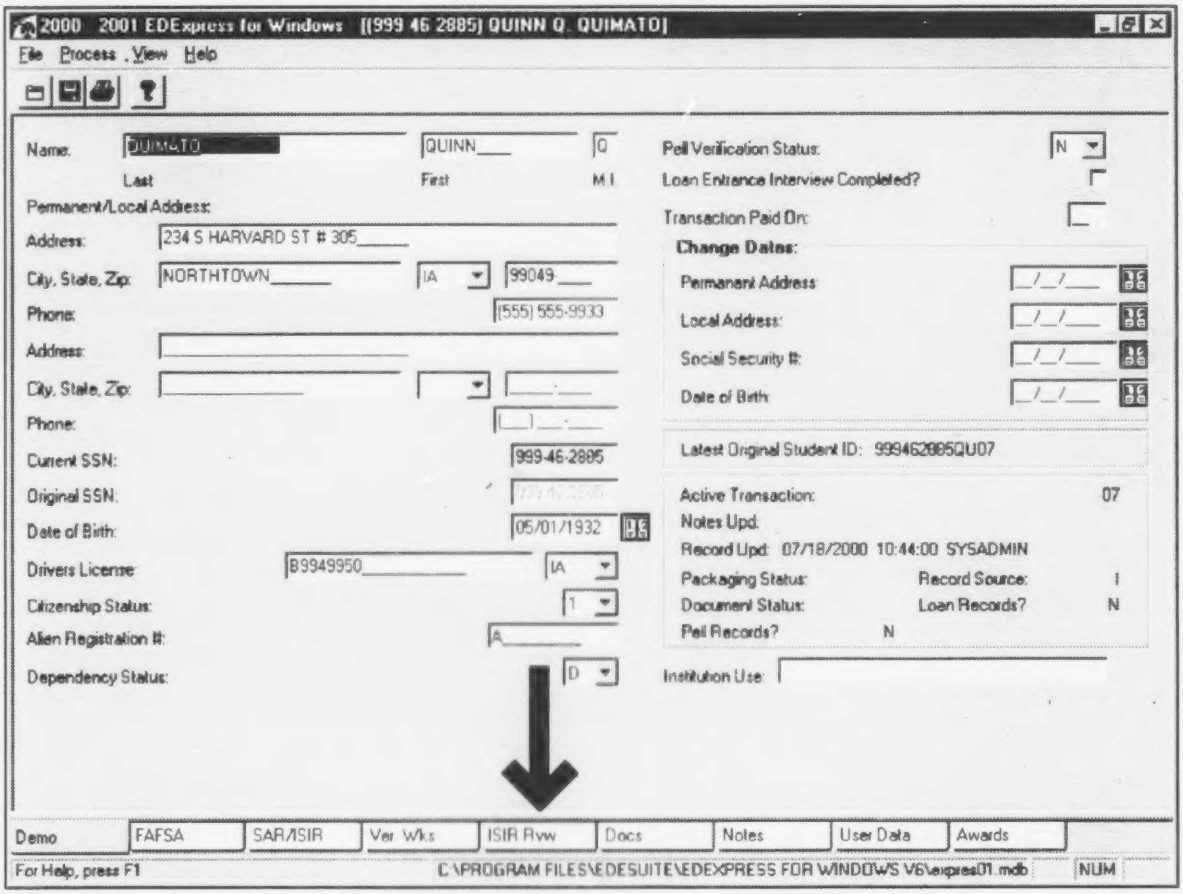

2000 2001 EDExpress for Windows [C:\TEMP\ART12.tmp]
Print...
Next Page
Prev Page
Last Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

```
Report Date  01/19/2000     U.S. DEPARTMENT OF EDUCATION                PAGE:  1
Report Time    13:16:59          EDEXPRESS - 2000-2001
                                PROCESSED RECORDS LIST
                                     BATCH NUMBER
     THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
**********************************************************************************
LAST NAME            FIRST      MI   SOCIAL        TRANS  PROCESSED   TRANS
                     NAME            SECURITY NO     #      DATE      TYPE    EFC    VER
-----------------    ---------  --   -----------   -----  ----------  -----  ------  ---
QUIMATO              QUINN      Q    999-46-2885    06    01/15/2001    1     133     N
COMMENT CODES: 006,149,118,146,029,137


RALJON               REGINA     R    999-46-6218    05    01/15/2001    1    2,604    Y
COMMENT CODES: 006,050,069,072,143,033,140


TUBSEY               TERRENCE   O    999-70-1713    02    03/05/2001    2             N
COMMENT CODES: 172,006,149,118,095,029


FOGELMAN             FARAH      L    999-72-7499    02    07/18/2000    0    1,033    Y
COMMENT CODES: 006,149,061,062,030,140

                                                                 Totals: 4
```

The ISIR Review Tab

*In an open student record, click the **ISIR RVW** (ISIR Review) tab.*

The ISIR Review tab allows users to visually compare the data contained within two ISIR transactions.



2000 2001 EDExpress for Windows [(999 46 2885) QUINN Q. QUIMATO]

Name: QUIMATO (Last) QUINN (First) Q (M.I.)

Permanent/Local Address:

Address: 234 S HARVARD ST # 305

City, State, Zip: NORTHTOWN IA 99049

Phone: (555) 555-9933

Address:

City, State, Zip:

Phone:

Current SSN: 999-46-2885

Original SSN: [illegible]

Date of Birth: 05/01/1932

Drivers License: B9949950 IA

Citizenship Status: 1

Alien Registration #: A

Dependency Status: D

Pell Verification Status: N

Loan Entrance Interview Completed? ☐

Transaction Paid On:

Change Dates:

Permanent Address: _/_/___

Local Address: _/_/___

Social Security #: _/_/___

Date of Birth: _/_/___

Latest Original Student ID: 999462885QU07

Active Transaction: 07

Notes Upd:

Record Upd: 07/18/2000 10:44:00 SYSADMIN

Packaging Status:

Record Source: I

Document Status:

Loan Records? N

Pell Records? N

Institution Use:

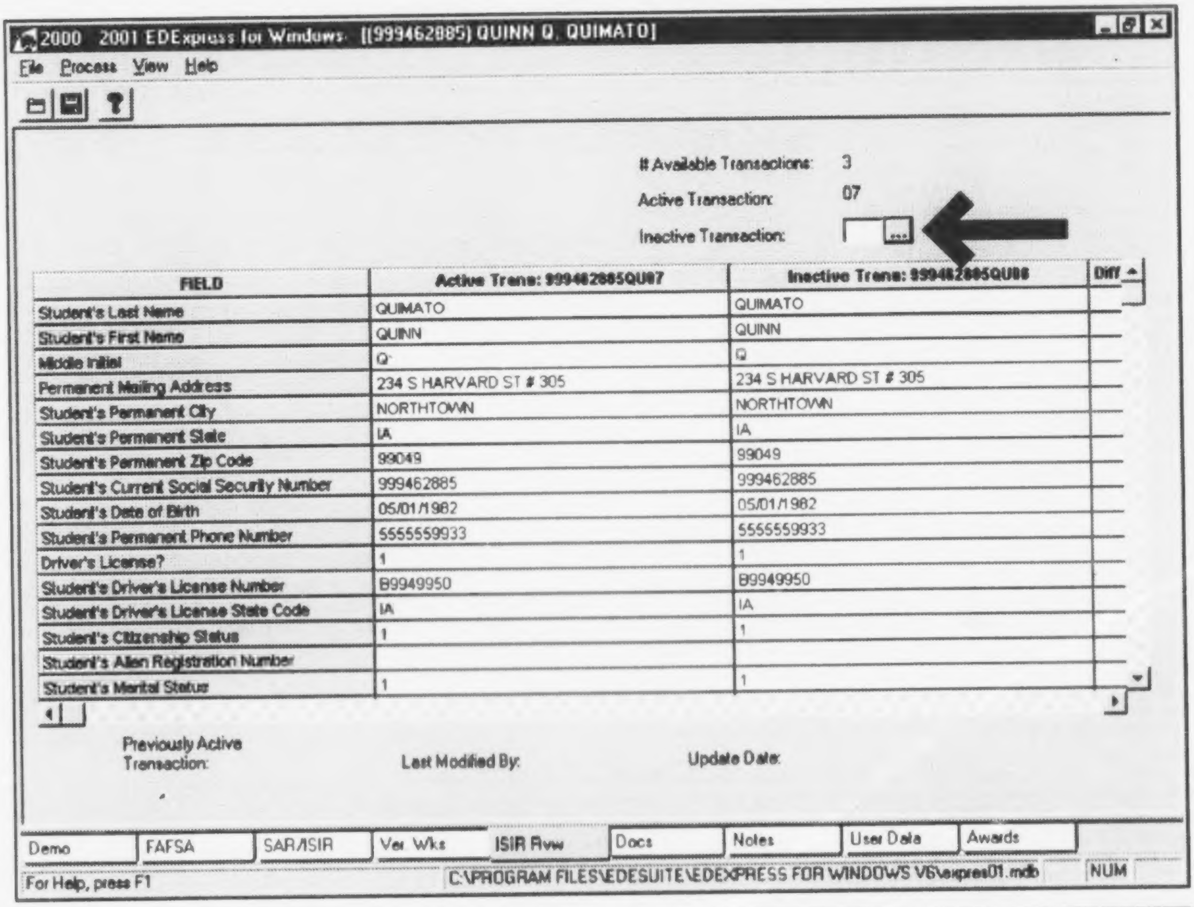
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

The number of available transactions is 3. The active transaction displayed is 07.

We want to see a list of the available ISIR transactions. To do this, click the ellipsis button next to the Inactive Transaction field.

*Click the **ellipsis** button next to the inactive transaction box to see all the ISIR transactions for this record.*


2000 2001 EDExpress for Windows [(999462885) QUINN Q. QUIMATO]
File Process View Help

Available Transactions: 3
Active Transaction: 07
Inactive Transaction:

FIELD	Active Trans: 999462885QU07	Inactive Trans: 999462885QU08	Diff
Student's Last Name	QUIMATO	QUIMATO	
Student's First Name	QUINN	QUINN	
Middle Initial	Q	Q	
Permanent Mailing Address	234 S HARVARD ST # 305	234 S HARVARD ST # 305	
Student's Permanent City	NORTHTOWN	NORTHTOWN	
Student's Permanent State	IA	IA	
Student's Permanent Zip Code	99049	99049	
Student's Current Social Security Number	999462885	999462885	
Student's Date of Birth	05/01/1982	05/01/1982	
Student's Permanent Phone Number	5555559933	5555559933	
Driver's License?	1	1	
Student's Driver's License Number	B9949950	B9949950	
Student's Driver's License State Code	IA	IA	
Student's Citizenship Status	1	1	
Student's Alien Registration Number			
Student's Marital Status	1	1	

Previously Active Transaction:
Last Modified By:
Update Date:

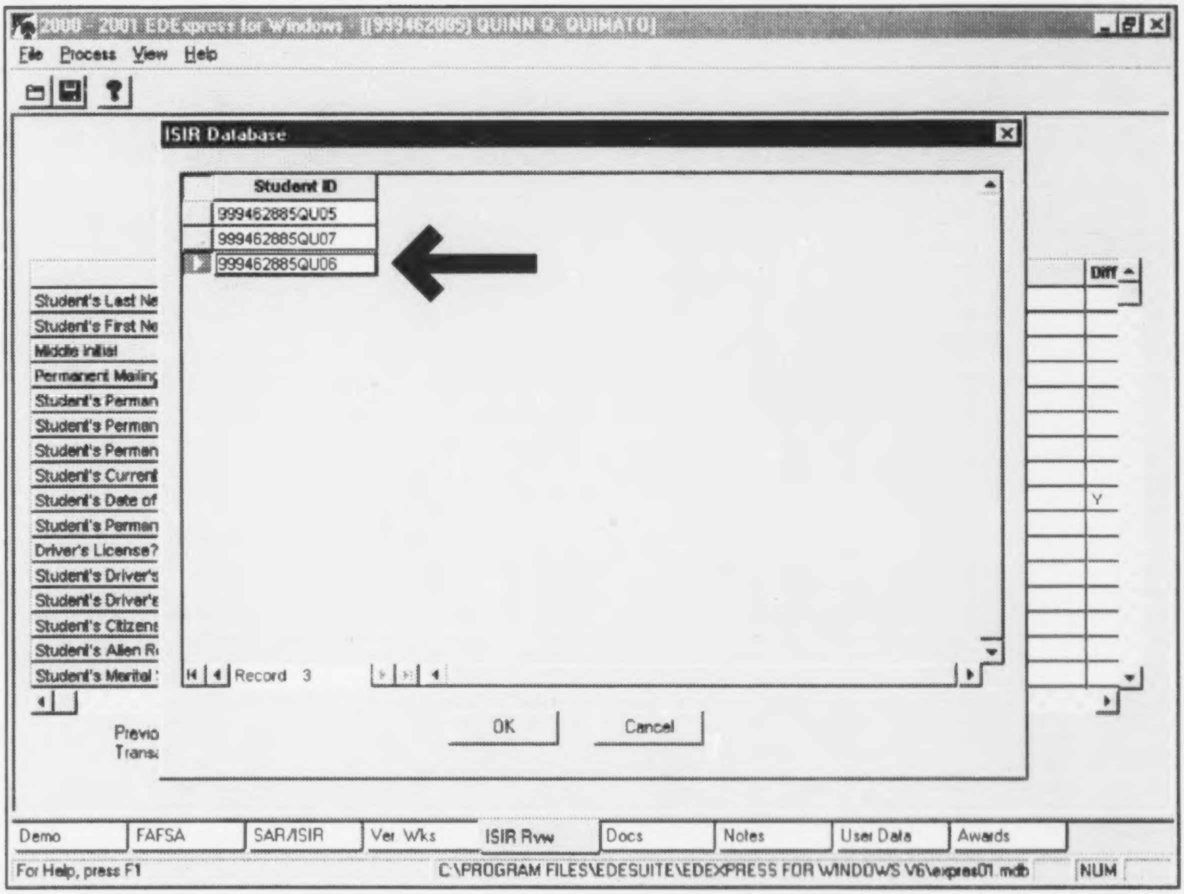
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Click the transaction number for 06.

*Click **OK**.*

The ISIR database shows 3 transactions: 05, 06, and 07.

In this example, transaction number 06 is the transaction that we want to activate.



2000 - 2001 EDExpress for Windows - [(999462885) QUINN Q. QUIMATO]

ISIR Database

Student ID
999462885QU05
999462885QU07
999462885QU06

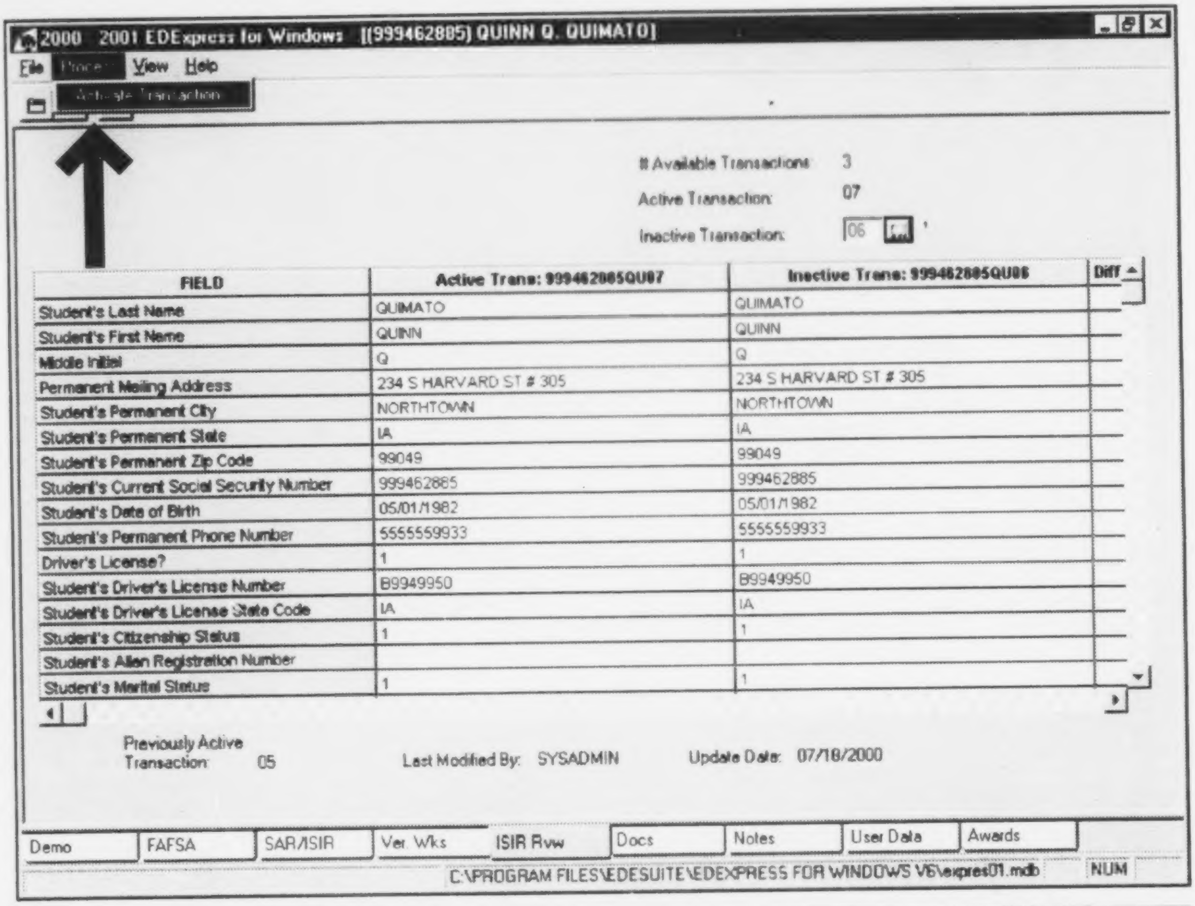
Record 3

File
Process
View
Help
Student's Last Na
Student's First Na
Middle Initial
Permanent Mailing
Student's Perman
Student's Perman
Student's Perman
Student's Current
Student's Date of
Student's Perman
Driver's License?
Student's Driver's
Student's Driver's
Student's Citizens
Student's Alien R
Student's Marital
Diff
Y
Previo
Trans
OK
Cancel
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

The Activate Transaction process allows you to select a specific transaction on your database as the active ISIR.

Notice that the transaction number 06 displays in the Inactive Transaction field. This is the transaction number that will be activated.

Select ***Process/ Activate Transaction*** *from the menu bar.*


2000 2001 EDExpress for Windows [(999462885) QUINN Q. QUIMATO]
File
Process
View
Help
Activate Transaction
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

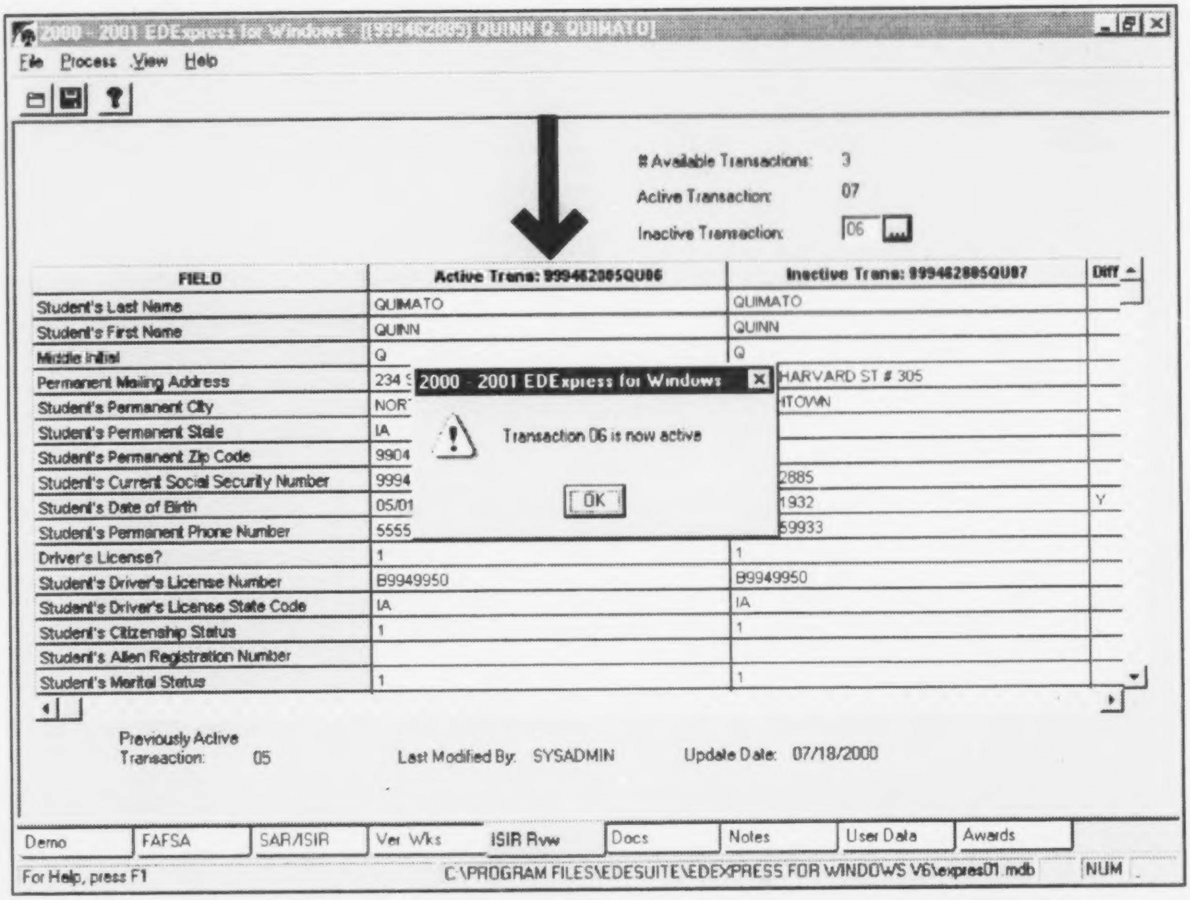
Available Transactions: 3
Active Transaction: 07
Inactive Transaction: 06

FIELD	Active Trans: 999462885QU07	Inactive Trans: 999462885QU06	Diff
Student's Last Name	QUIMATO	QUIMATO	
Student's First Name	QUINN	QUINN	
Middle Initial	Q	Q	
Permanent Mailing Address	234 S HARVARD ST # 305	234 S HARVARD ST # 305	
Student's Permanent City	NORTHTOWN	NORTHTOWN	
Student's Permanent State	IA	IA	
Student's Permanent Zip Code	99049	99049	
Student's Current Social Security Number	999462885	999462885	
Student's Date of Birth	05/01/1982	05/01/1982	
Student's Permanent Phone Number	5555559933	5555559933	
Driver's License?	1	1	
Student's Driver's License Number	B9949950	B9949950	
Student's Driver's License State Code	IA	IA	
Student's Citizenship Status	1	1	
Student's Alien Registration Number			
Student's Marital Status	1	1	

Previously Active Transaction: 05
Last Modified By: SYSADMIN
Update Date: 07/18/2000

*Click **OK***

Transaction number 06 is now in the Active Transaction column


2000 - 2001 EDExpress for Windows - [999462885] QUINN Q. QUIMATO]
File
Process
View
Help
2000 - 2001 EDExpress for Windows
OK
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Available Transactions: 3
Active Transaction: 07
Inactive Transaction: 06

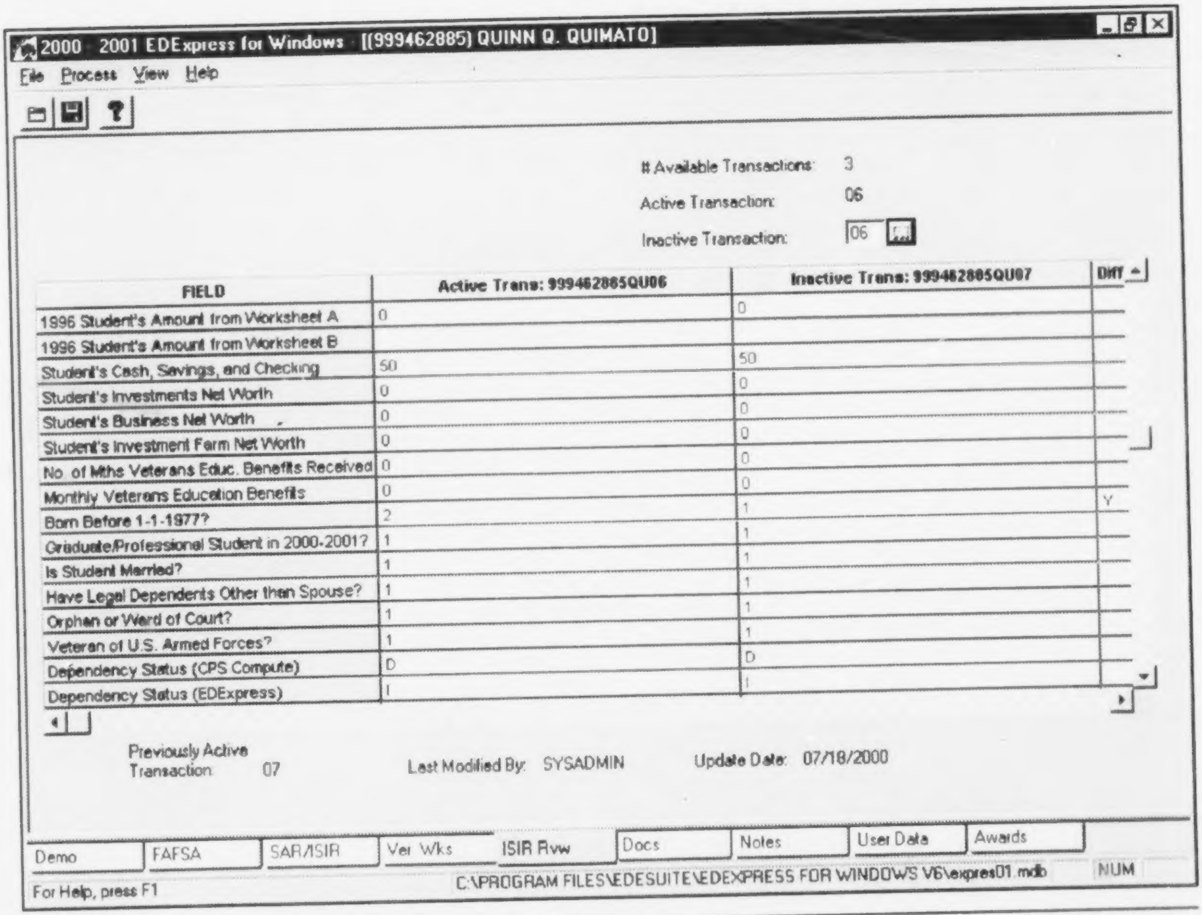
FIELD	Active Trans: 999462885QU06	Inactive Trans: 999462885QU07	Diff
Student's Last Name	QUIMATO	QUIMATO	
Student's First Name	QUINN	QUINN	
Middle Initial	Q	Q	
Permanent Mailing Address	234 S	HARVARD ST # 305	
Student's Permanent City	NOR	ITOWN	
Student's Permanent State	IA		
Student's Permanent Zip Code	9904		
Student's Current Social Security Number	9994	2885	
Student's Date of Birth	05/01	1932	Y
Student's Permanent Phone Number	5555	59933	
Driver's License?	1	1	
Student's Driver's License Number	B9949950	B9949950	
Student's Driver's License State Code	IA	IA	
Student's Citizenship Status	1	1	
Student's Alien Registration Number			
Student's Marital Status	1	1	

Transaction 06 is now active

Previously Active Transaction: 05
Last Modified By: SYSADMIN
Update Date: 07/18/2000

The Diff. Column shows that the answer to the question Born before January 1, 1977 was changed from yes (01) to no (02).

*To confirm that the correct ISIR is now being used, click the **SAR/ISIR** tab.*

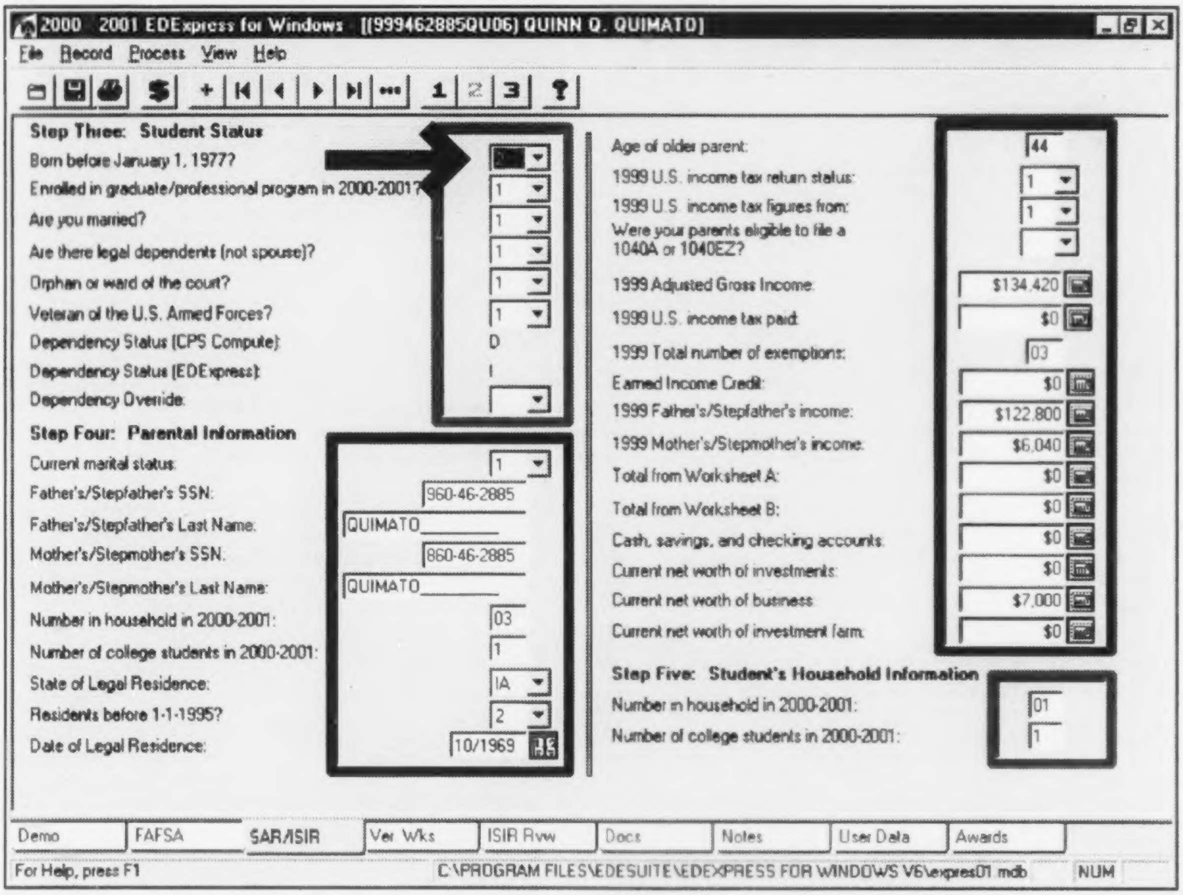

2000 - 2001 EDExpress for Windows - [(999462885) QUINN Q. QUIMATO]
File
Process
View
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Available Transactions: 3
Active Transaction: 06
Inactive Transaction: 06

FIELD	Active Trans: 999462885QU06	Inactive Trans: 999462885QU07	Diff
1996 Student's Amount from Worksheet A	0	0	
1996 Student's Amount from Worksheet B			
Student's Cash, Savings, and Checking	50	50	
Student's Investments Net Worth	0	0	
Student's Business Net Worth	0	0	
Student's Investment Farm Net Worth	0	0	
No. of Mths Veterans Educ. Benefits Received	0	0	
Monthly Veterans Education Benefits	0	0	
Born Before 1-1-1977?	2	1	Y
Graduate/Professional Student in 2000-2001?	1	1	
Is Student Married?	1	1	
Have Legal Dependents Other than Spouse?	1	1	
Orphan or Ward of Court?	1	1	
Veteran of U.S. Armed Forces?	1	1	
Dependency Status (CPS Compute)	D	D	
Dependency Status (EDExpress)	I	I	

Previously Active Transaction: 07
Last Modified By: SYSADMIN
Update Date: 07/18/2000

The answer on this record now shows a 2 and confirms that we are using the active ISIR selected.


2000 2001 EDExpress for Windows [(999462885QU06) QUINN Q. QUIMATO]
File
Record
Process
View
Help
$
+
1
2
3
?
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Step Three: Student Status

Born before January 1, 1977?: 2
Enrolled in graduate/professional program in 2000-2001?: 1
Are you married?: 1
Are there legal dependents (not spouse)?: 1
Orphan or ward of the court?: 1
Veteran of the U.S. Armed Forces?: 1
Dependency Status (CPS Compute): D
Dependency Status (EDExpress): I
Dependency Override:

Step Four: Parental Information

Current marital status: 1
Father's/Stepfather's SSN: 960-46-2885
Father's/Stepfather's Last Name: QUIMATO
Mother's/Stepmother's SSN: 860-46-2885
Mother's/Stepmother's Last Name: QUIMATO
Number in household in 2000-2001: 03
Number of college students in 2000-2001: 1
State of Legal Residence: IA
Residents before 1-1-1995?: 2
Date of Legal Residence: 10/1969

Age of older parent: 44
1999 U.S. income tax return status: 1
1999 U.S. income tax figures from: 1
Were your parents eligible to file a 1040A or 1040EZ?:
1999 Adjusted Gross Income: $134,420
1999 U.S. income tax paid: $0
1999 Total number of exemptions: 03
Earned Income Credit: $0
1999 Father's/Stepfather's income: $122,800
1999 Mother's/Stepmother's income: $6,040
Total from Worksheet A: $0
Total from Worksheet B: $0
Cash, savings, and checking accounts: $0
Current net worth of investments: $0
Current net worth of business: $7,000
Current net worth of investment farm: $0

Step Five: Student's Household Information

Number in household in 2000-2001: 01
Number of college students in 2000-2001: 1

Lesson 6 Exercise

Scenario:

In the exercise for Lesson 2 you exported an ISIR corrections batch. It is two days later now, and you want to import the corrected ISIRs. Maria, your FAO, always wants to have a printed list of the corrected ISIRs after they are imported.

Exercise Instructions:

The tasks for this exercised are outlined below. You will complete the tasks and answer questions that pertain to those tasks. Read the tasks AND the questions before you begin the exercise! Answers to some of the questions may be a part of the task or involve a computer response.

Import the corrected ISIRs batches (SARR01OP.dat and SARR01OP.001) and then print a list of corrected ISIRs for that batch ID. After you are done, answer the following questions:

1. What is the batch ID of the imported batch?

2. How many records were imported in the batch?

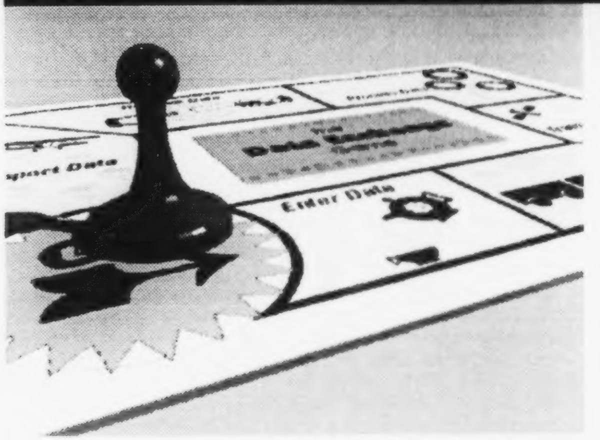
3. Did the batch contain any error records?

4. Will the number of records in the imported batch be the same as the number in the exported batch (from Lesson 2)?

5. What selection criteria did you use in the query for the printed list?

6. Are there comment codes on any of the student records?

Unit 4


Export Data
Enter Data

Apply What You Learned

Unit 4—Apply What You Learned

Scenario

In this unit you will apply all of the concepts and technical skill you have acquired today to the efficient operation of a fully functional electronic financial aid office. You have just started working in the financial aid office at the Tri-City College of Astrophotography, which offers certificates and degrees in the fields of solar, galactic and star system photography using the latest in radio telescope and traditional film technology.

The Director of Financial aid has provided you with a schedule of activities for one week of electronic processing and assignments to complete during the week. The school annually enrolls approximately 1,200 students, most of which apply for and receive some financial assistance. Since the aid office has a small staff, you will be performing all of the different tasks associated with the EDE process.

What to do

To complete each of the tasks assigned, you will use the resources of Units 1-3 of this training guide, your assigned team members and the instructor. A general description of each task to be completed is provided, but how you complete the task is up to you and your teammates. Each task also includes questions that you must answer, and there is not necessarily one right answer to each question. Finally, your group will add assigned answers to the appropriate space on the classroom gameboard.

Questions assigned to my group. ______

As you proceed through each problem, you will need to log all transactions in your data processing log. A blank gameboard has also been provided for you to record your answers to each of the problems.

The weekly processing schedule is provided below.

Monday	Tuesday	Wednesday	Thursday	Friday
Enter initial applications	Enter Corrections	Evaluate ISIR changes	Enter Corrections	
	Retrieve automatic ISIRs (SARA file) Retrieve processed correction ISIRs (SARR file)		Retrieve processed application ISIRs (from Monday's entry – EAPS file)	Retrieve processed correction ISIRs (from Tuesday's entry – SARR file)

Monday:

On Monday morning you enter the office and see Lauren E. Larson. Lauren has an appointment to meet with you concerning her ability to pay for school. She would like to know what her family will be expected to pay. She has completed her FAFSA and provided it to you (on following page). Of course, you will want to determine her eligibility by calculating her Expected Family Contribution and estimated Pell Grant award. You will also need to add a note to her record describing her office visit.

Other activities for today:

1. Export applications
2. Transmit applications
3. Print a list of all applications including estimated EFCs.

Remember to log all of your activity in your processing log.

What did you find out?

1. What was Lauren Larson's estimated EFC?

2. How many electronic applications have been added to the database so far this year?

3. Is there some inconsistency in Beverly Bantey's income and AGI? If her AGI and student income were $42,220, what would her estimated taxes and EFC be? If her AGI and student income were $3,234, what would her estimated taxes and EFC be? Would either change in income likely affect the type of tax return she files?

4. After completing activities 1-3, what value should all of the status flags be for the application records?

5. How many dependent student application records are on the database?

6. What is an easy way to determine which application records were included in a particular batch?

Unit 4—Apply What You Learned

Tuesday:

You have reviewed the ISIRs of several students who are applying for aid, and have identified errors for 3 records, two of which are on your database. The following corrections should be made to the students' records and exported:

Hint: Use the SAR/ISIR tab to complete the first two corrections.

ID: 999-56-1013 NE 01

Tax Return Status: 1

Tax Figures from: 2 - 1040A/EZ

Eligible to File 1040A/EZ: 1 - Yes

Student's AGI: $4,087

Income Tax Paid: $0

Earned Income Credit: $680

Student's Income from Work: $4,087

This student's parents have divorced, and the corrections reflect the student residing with the father.

ID: 999-62-6852 LU 01

Parent's 1999 AGI: $60,460

Father's Income Earned from Work: $60,460

Mother's Income Earned from Work: $0

Hint: Use Quick Corrections to complete this correction.

ID: 999-81-9871 YO 02

College choice #1: Our school code

DRN: 4587

Parent's Marital Status: 1

Father's Income Earned from Work: $0

Parent's Adjusted Gross Income: $32,345

Other activities for today include:

1. Export Correction records
2. Print a list of entered correction records for today only.
3. Send corrections and retrieve Automatic ISIRs from mailbox (use all CPS data).
4. Import ISIRs.

Remember to log all of your activity in your processing log.

What did you find out?

1. If you use Quick Corrections, is there a way to determine the estimated EFC for the students? If there is, what are the estimated EFCs for each of the corrected records?

2. For the student that you added your institution code, what would have happened if you needed to correct 10 more items?

3. What is the SAR field number for Father's Income Earned from Work?

4. How many ISIR records were in the batch you imported?

5. From the request you created in EDconn32, would you have received any Pell system data files if they were in your mailbox?

6. How could you have identified other data in your mailbox?

7. For the second correction you created, should you have calculated the taxes paid?

Unit 4—Apply What You Learned

Wednesday:

This Wednesday happens to be a slow day in your office. You check your processing calendar and see that you are scheduled to evaluate the ISIR data you received yesterday.

You need to identify any new ISIRs with rejects. You also need to decide on the active transaction for any records that have more than one ISIR. For some of the rejects, you may need to request documents (i.e., tax returns or verification forms) from the students. Sending a letter to the student, also helps in getting the document from the student.

Tip: Before you can request documents from a student, you must first add the document to the system. Setting up the document letter text may also be helpful.

What did you find out?

1. How many total rejected ISIRs are on the database?

2. How many rejected ISIRs are in the most recent batch?

3. Identify one of the new rejects and the problem to be resolved.

4. Was it necessary to do a global document add for any documents you requested?

5. Did you actually receive any documents back from the students? If you did, what steps would you take to record the fact?

Thursday:

Jeff Reindeer dropped by the office with his tax returns and verification worksheet. Compare his verification worksheet to his ISIR record. If he needs any changes, you should make those changes and export them. Use the Verification Worksheet tab to record the changes.

In addition to Jeff's problems, you also need to go ahead and make the necessary corrections for the rejected records you discovered yesterday. Use the SAR/ISIR tab to record any of these changes.

Every Thursday you also check to see if Monday's initial applications have been processed. If so, you may want to import those. Don't forget to export and transmit anything you batched today.

Remember to log all of your activity in your processing log.

What did you find out?

1. How many correction records were included in your export batch?

2. Could you have made any or all of the corrections using the Quick Corrections feature? What is the advantage to using the Verification Worksheet tab?

3. How many records were in the electronic applications file you imported?

4. How many correction records now exist on your database?

Friday:

The end of the week is here. Should there be something in your mailbox? You may want to check. If so, you should send a request to receive that data.

The Dean of Enrollment Management just called the office and wants a list of all students who will be receiving Pell Grants this year. She also wants to know if any of them are from the states Ohio, Kentucky, Virginia or Texas. It seems that alumni flush with cash from these states want to give some need-based scholarships to the most needy students.

Remember to log all of your activity in your processing log.

What did you find out?

1. Were there any files to retrieve from your mailbox? What kind of files?

2. If one of the files was an SARE, what steps would you take to resolve the problem?

3. How many students will be receiving a full award Pell Grant (assuming full-time enrollment for all)?

4. How many of these students are from the above listed states?

Appendix A

Introduction to Query Information

Query

A query is simply a logical statement using a predefined set of criteria to identify a particular student population. Think of a query as a lid on a box with geometric-shaped holes. Only objects that have the right shape can pass through the lid; all others will not.

You use a query to select or filter certain types of data. You may want to print a list that includes only students who have specific attributes such as dependency or housing status. In addition, you may want to limit a fund to students in a specific description. For each type of these applications you must define a query that selects the desired group.

In EDExpress some of the queries you create will assist you in:

- Assigning documents
- Printing letters and reports

Tips for Queries

The Standard Query Language tool in EDExpress creates simple logical selection statements. When you construct a Query some basic rules apply:

- The only connectors available are AND and OR.
- The Query is processed from left to right or beginning to end.
- AND means all conditions that have been joined must be true for the Query to select records. If one or more AND(s) appear in a statement, the software applies the AND(s) from left to right in the statement.

Example

> *Dependency status = D* AND *State of Residency = VA* AND *Verification selection = Y*
>
> The software compares the dependency status first, then the residency, and finally the verification. If the record does not meet all three criteria, it is not selected.

- OR divides the query statement into sections and selects a record if any section is true.

Example

> *State of Residency = VA* OR *State of Residency = DC*
>
> The portion of the query before OR and the entire portion after OR are two complete statements. If either portion is true, the record is selected.

- If AND and OR are used in the same query statement you must use parentheses to separate them.
- Parentheses change the order of precedence. Expressions enclosed in parentheses are processed before AND and OR. In the case of nested expressions, innermost parentheses are processed first.

Example

> *(State of Residency = VA* OR *State of Residency = DC)* AND *Housing Code = 1*
>
> In the above example, EDExpress first compares the parenthetical statement (State of Residency) and then the Housing code. If the record meets one of the first criteria and the second criteria, the record is selected.

- User Defined fields can be included in a query. Queries including a User Defined field can use both the AND and OR connectors.

Query Worksheet

SAMPLE

In the space below, describe the group of students to be selected. There are blank worksheets for your use at the end of this Appendix.

Select all students who are from either Virginia or the District of Columbia, and live on campus.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value
State of Residency	=	*VA*

And ☐ Or ☒ Left (☒ Right) ☐

State of Residency	=	*DC*

And ☒ Or ☐ Left (☐ Right) ☒

Housing Code	=	*1*

And ☐ Or ☐ Left (☐ Right) ☐

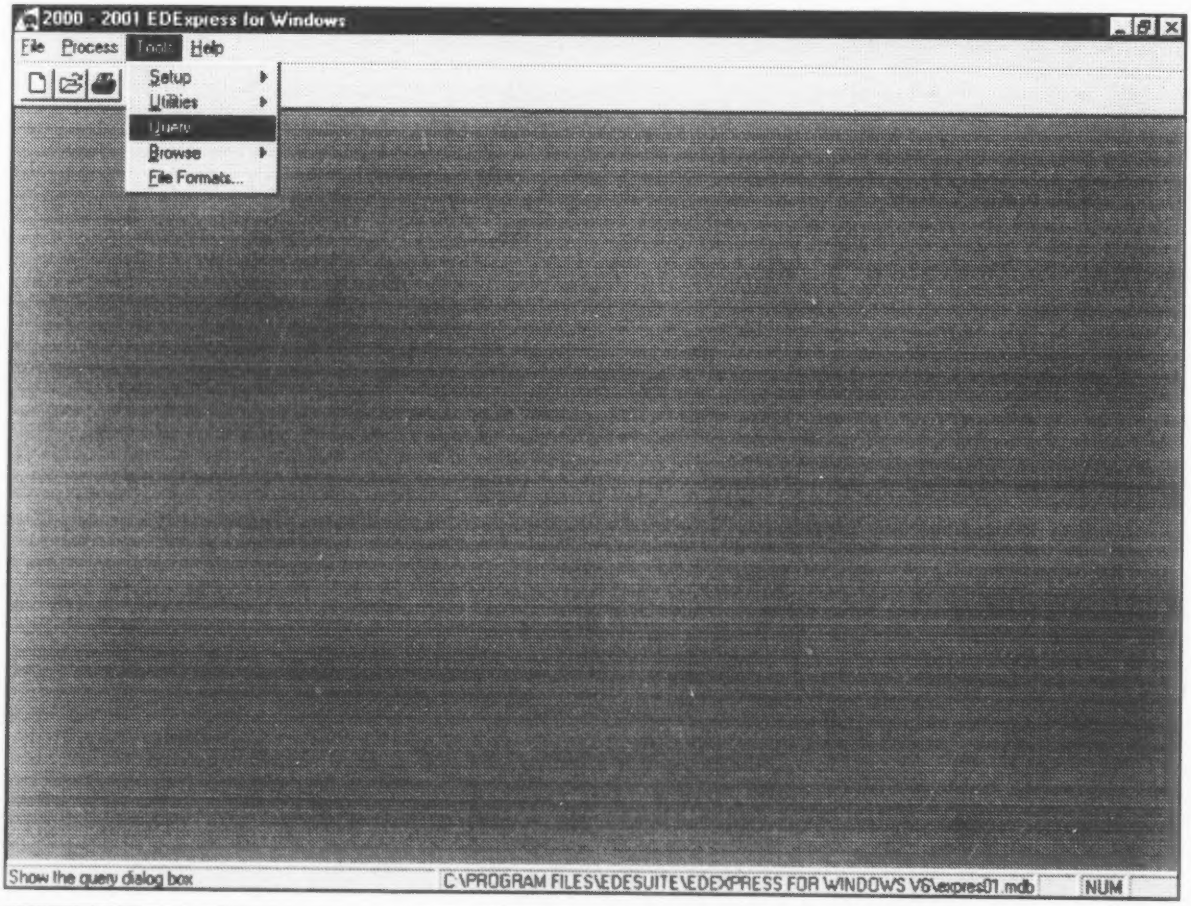
And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Creating a Query

To create a new Query, select ***Tools/Query*** *from the main menu bar.*

For our demonstration, we will create a query using Application Processing data. We want to identify students who are from either Virginia or Maryland and have an EFC that is less than 2000.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query
Browse
File Formats...
NUM

Show the query dialog box

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

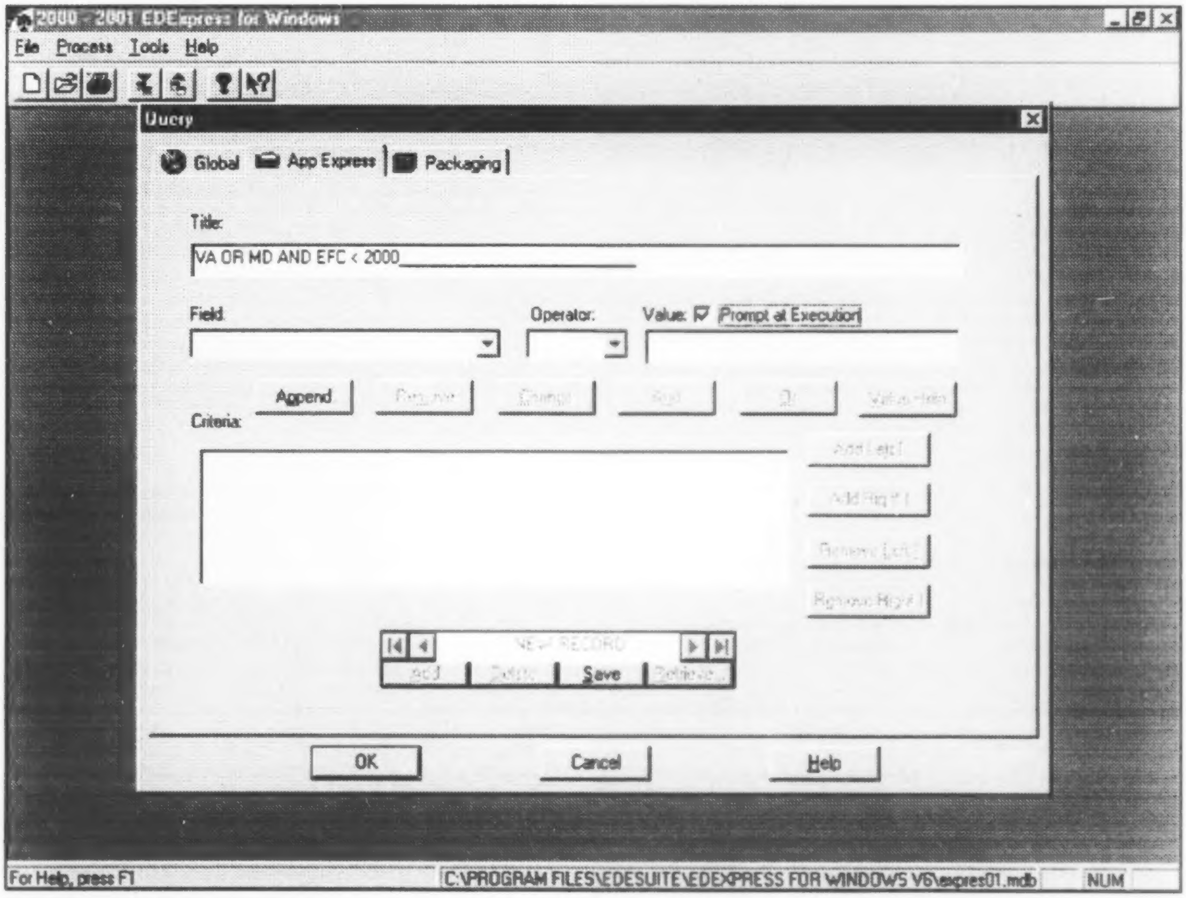
The Prompt at Execution checkbox on this screen indicates whether to prompt you for the value at the time you use the query. For example, if you routinely print a list of loan records and you want it to include records within a different SSN range each time you print the list, you can set up a query using the SSN field, an operator, and the Prompt at Execution option. Then, whenever you use the query, EDExpress prompts you to enter the range of SSNs you want to use at that time.

If you do not enable Prompt at Execution, EDExpress always uses the values you defined when you created the query. Queries that contain this option are called parameter queries.

*To begin the query, click on the **Add** button to clear all of the fields.*

Type a freeform title in the Title field.

*Click the **Prompt at Execution** checkbox if you want to be prompted for the value each time you use the query.*



Title: VA OR MD AND EFC < 2000

Value: ☑ Prompt at Execution

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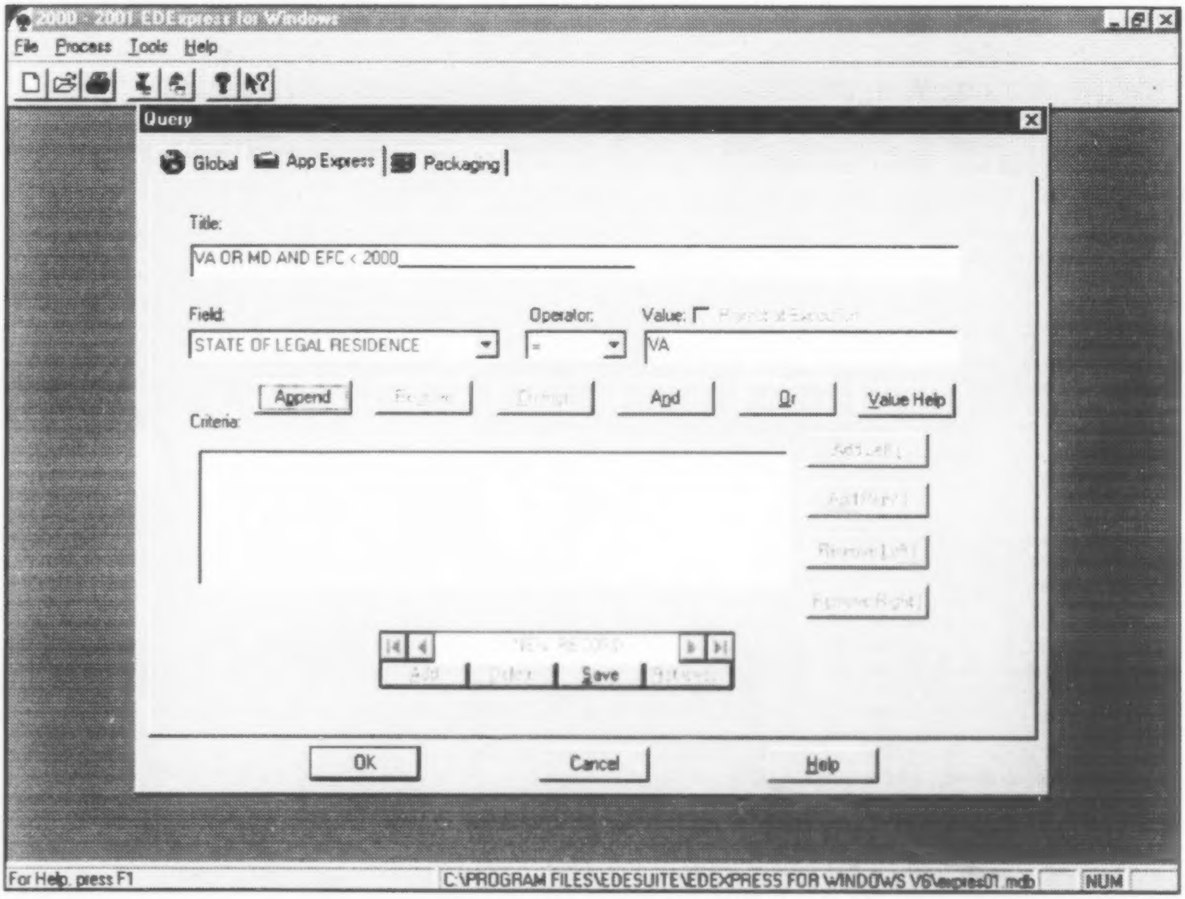
To complete the first part of the statement, select the state residency field. Click the ***down arrow*** *to see a full list of fields in the ISIR record.*

Click the ***down arrow*** *in the operator field to see a complete list of operators. In this example, the equal sign (=) will be the operator.*

Enter the value for the field. In this example, VA is used for Virginia.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Title: VA OR MD AND EFC < 2000

Field: STATE OF LEGAL RESIDENCE

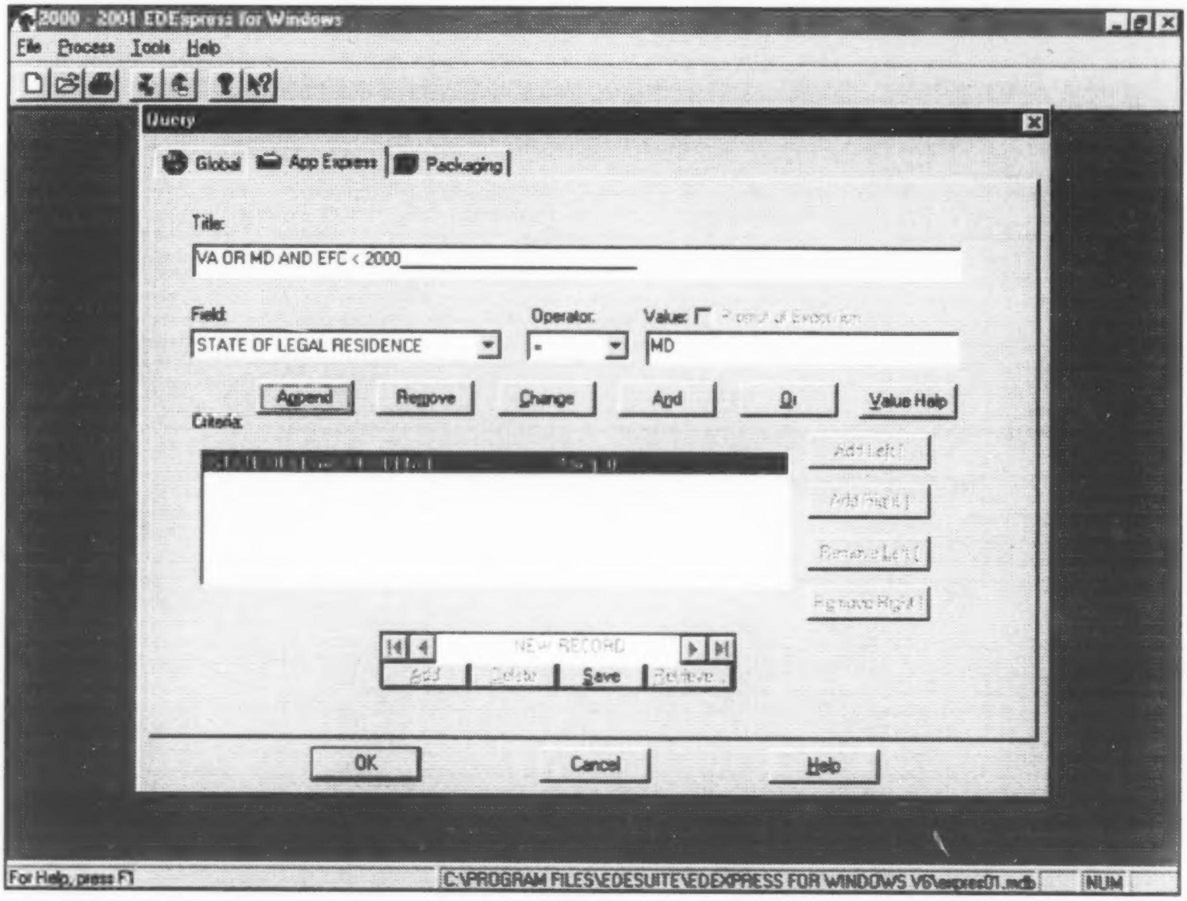
Operator: =

Value: VA

In this example, we also need to add Maryland to our value field.

*Click the **Append** button to add the statement to the query.*

*Click the **OR** button and enter **MD** in the value field.*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Title: VA OR MD AND EFC < 2000

Field: STATE OF LEGAL RESIDENCE

Operator: =

Value: ☐ Point of Execution MD

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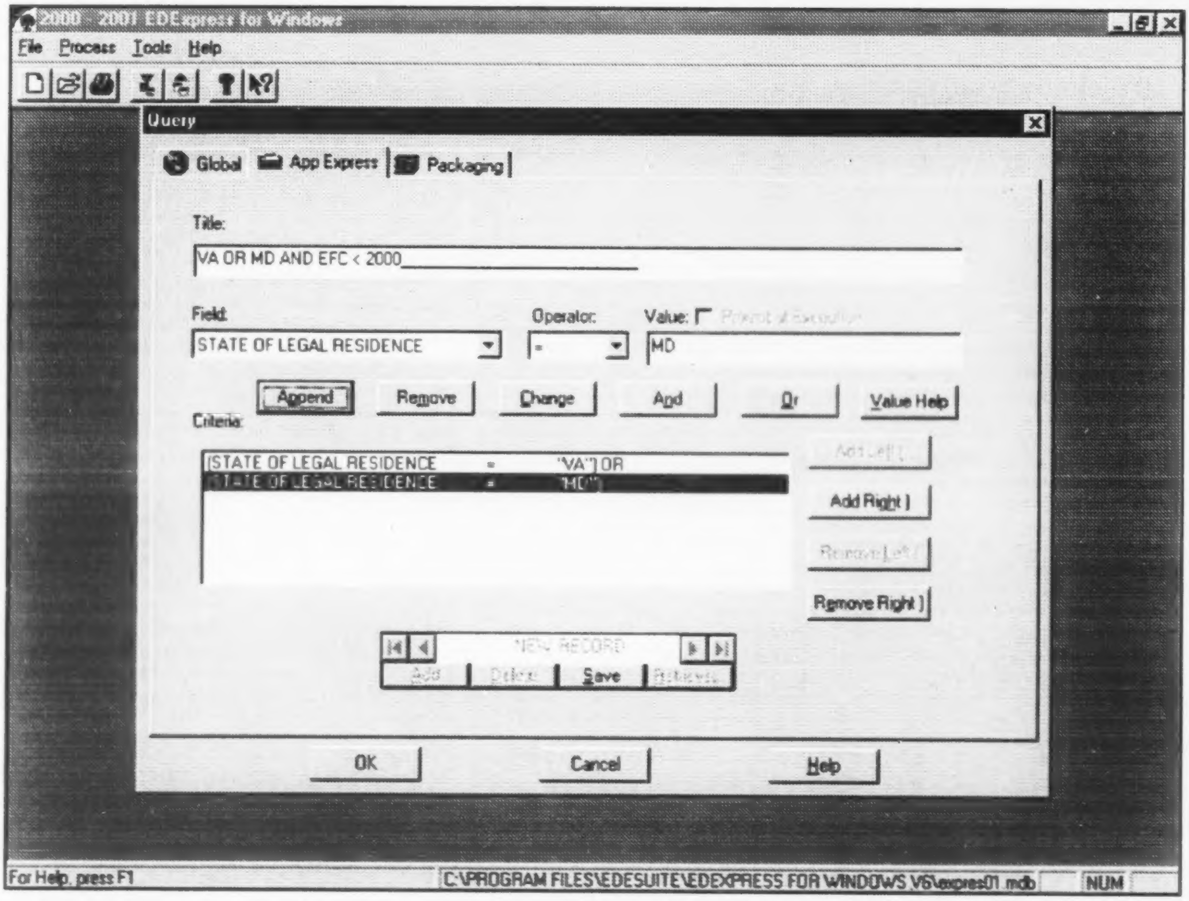
*Click the **Append** button to add the statement to the query.*



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Title: VA OR MD AND EFC < 2000

Field: STATE OF LEGAL RESIDENCE

Operator: =

Value: ☐ Prompt at Execution MD

Criteria:

(STATE OF LEGAL RESIDENCE = "VA") OR
(STATE OF LEGAL RESIDENCE = "MD")

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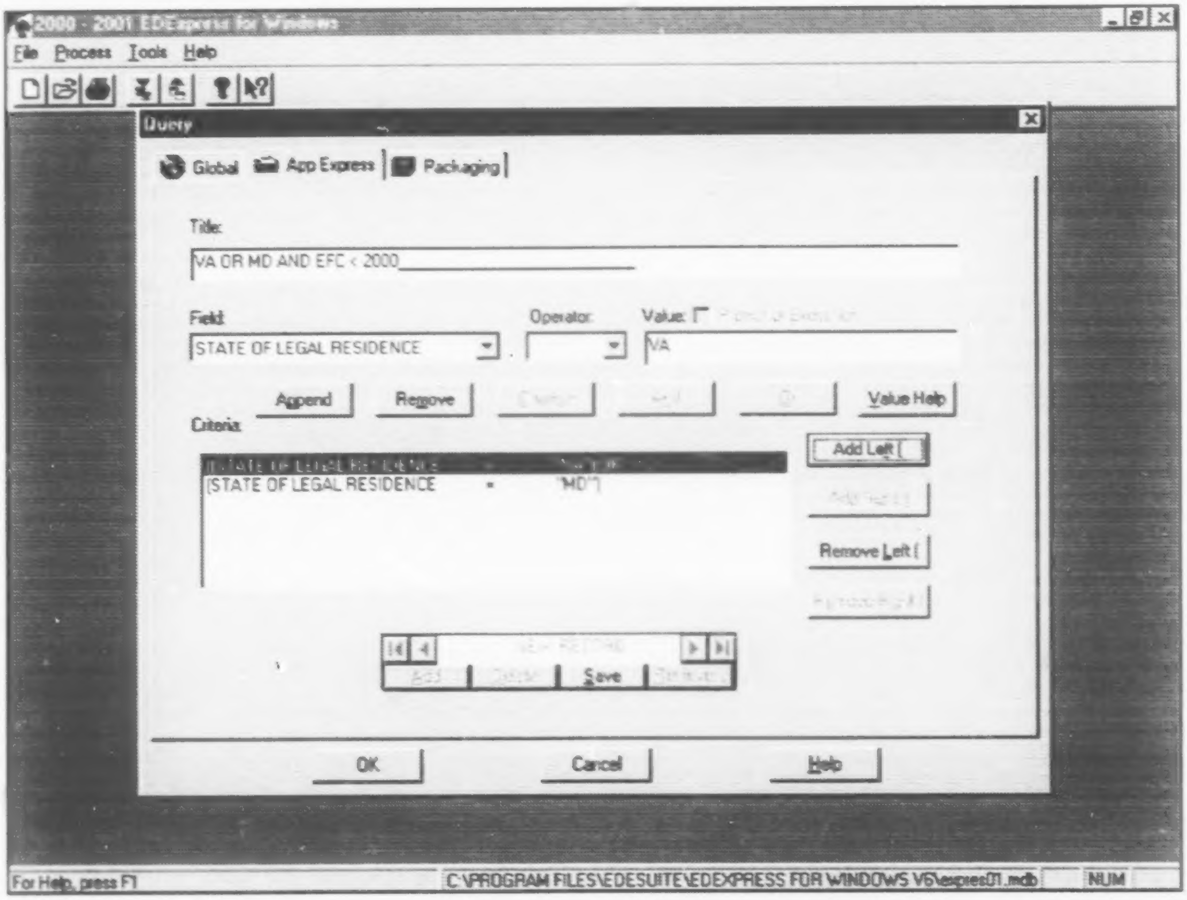
In this example, we must also add a criteria for the EFC for students from either state. To do this, we must separate the OR statement from the AND portion of the statement.

*Click the **Add Left (** button to add a left parenthesis to the statement.*



Title: VA OR MD AND EFC < 2000

Field: STATE OF LEGAL RESIDENCE

Value: VA

Criteria:

(STATE OF LEGAL RESIDENCE = "MD")

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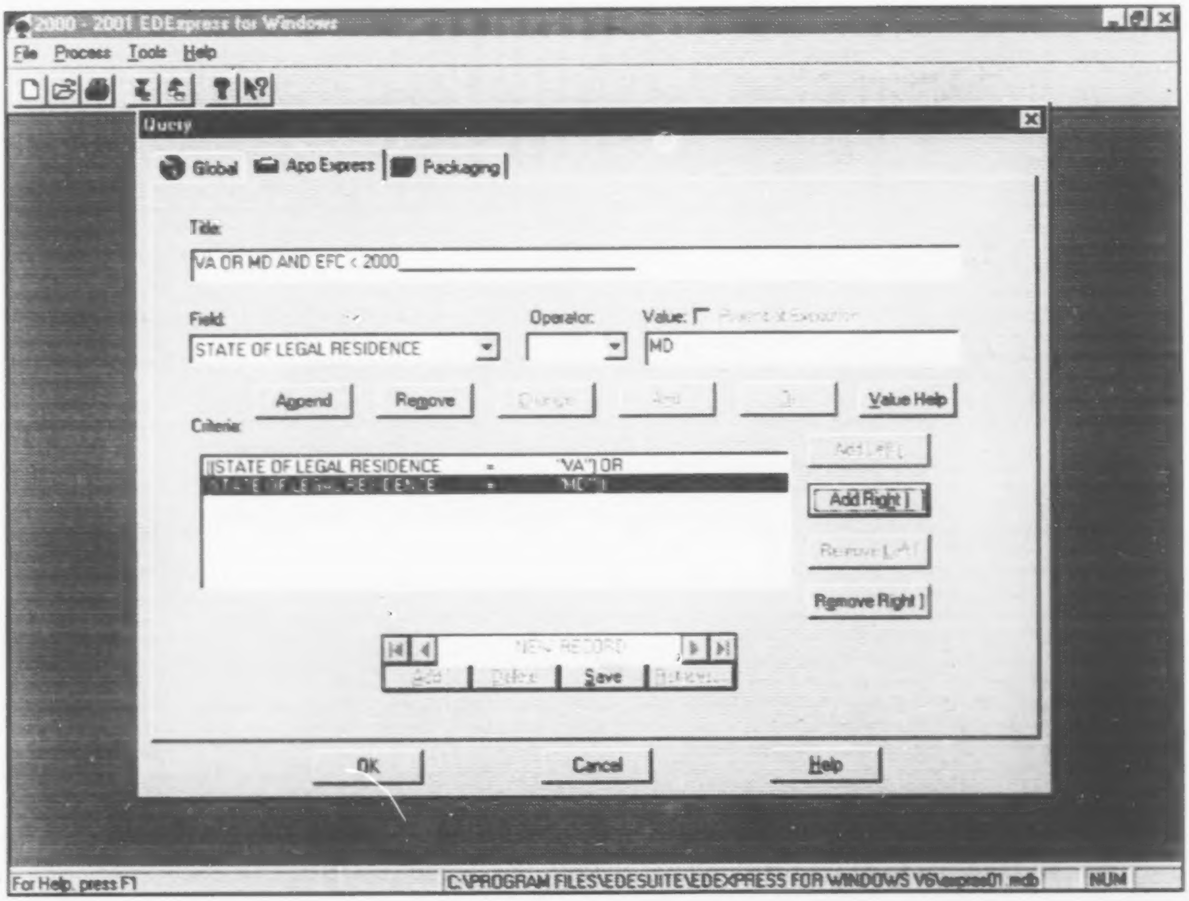
Click the ***Add Right)*** *button to add a right parenthesis to the statement.*



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OK
Cancel
Help
For Help, press F1
NUM

Title: VA OR MD AND EFC < 2000

Field: STATE OF LEGAL RESIDENCE

Operator:

Value: ☐ Prompt at Execution

MD

Criteria:

((STATE OF LEGAL RESIDENCE = "VA") OR
STATE OF LEGAL RESIDENCE = "MD")

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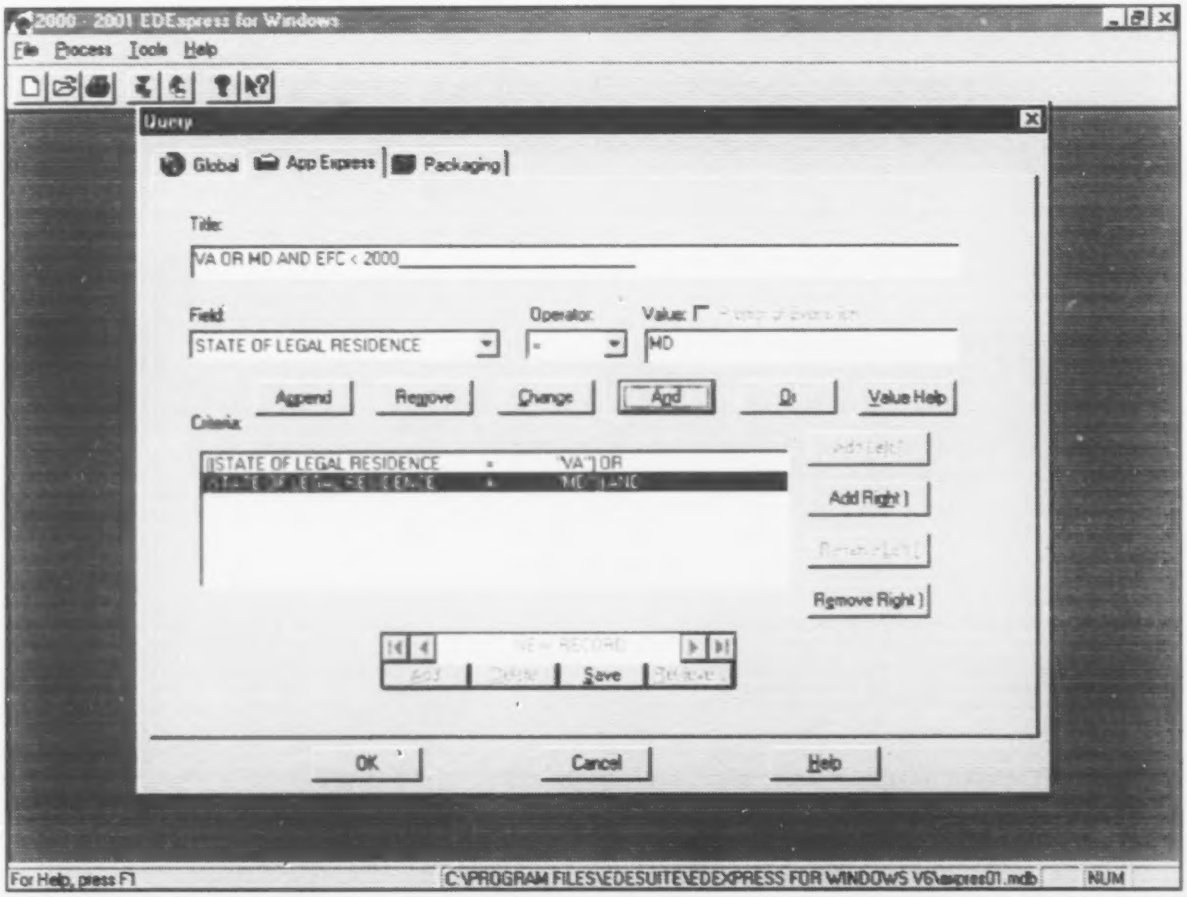
Click the ***AND*** *connector button.*

The AND portion of the statement is now separate from the OR portion of the statement.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Title: VA OR MD AND EFC < 2000

Field: STATE OF LEGAL RESIDENCE

Operator: =

Value: ☐ MD

Criteria:

(STATE OF LEGAL RESIDENCE = "VA") OR
STATE OF LEGAL RESIDENCE = "MD") AND

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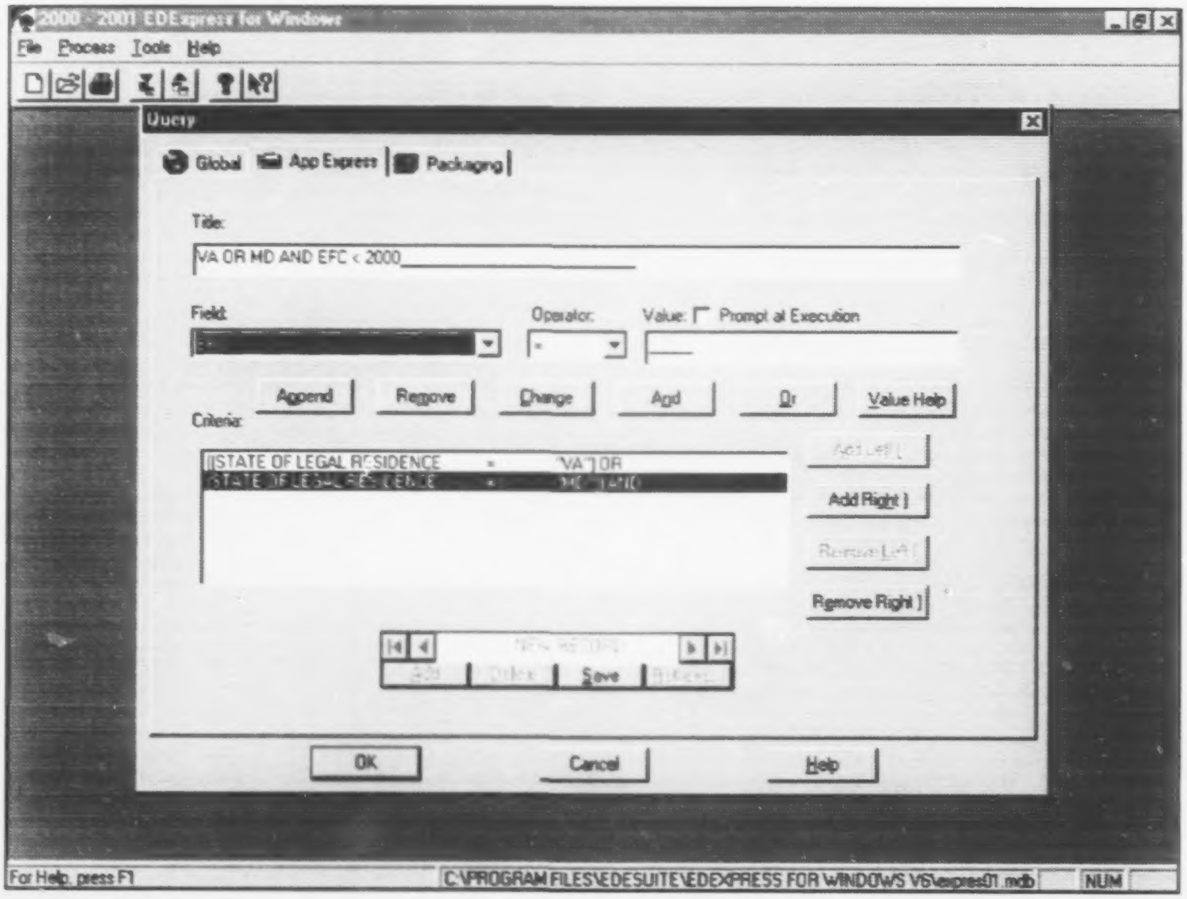
*Click the **down arrow** and select **EFC** from the list of fields in the ISIR records*

Now we want to add the EFC portion of the query.



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Title: VA OR MD AND EFC < 2000

Field:

Operator: =

Value: ☐ Prompt at Execution

Criteria:

((STATE OF LEGAL RESIDENCE = 'VA') OR
STATE OF LEGAL RESIDENCE = 'MD') AND

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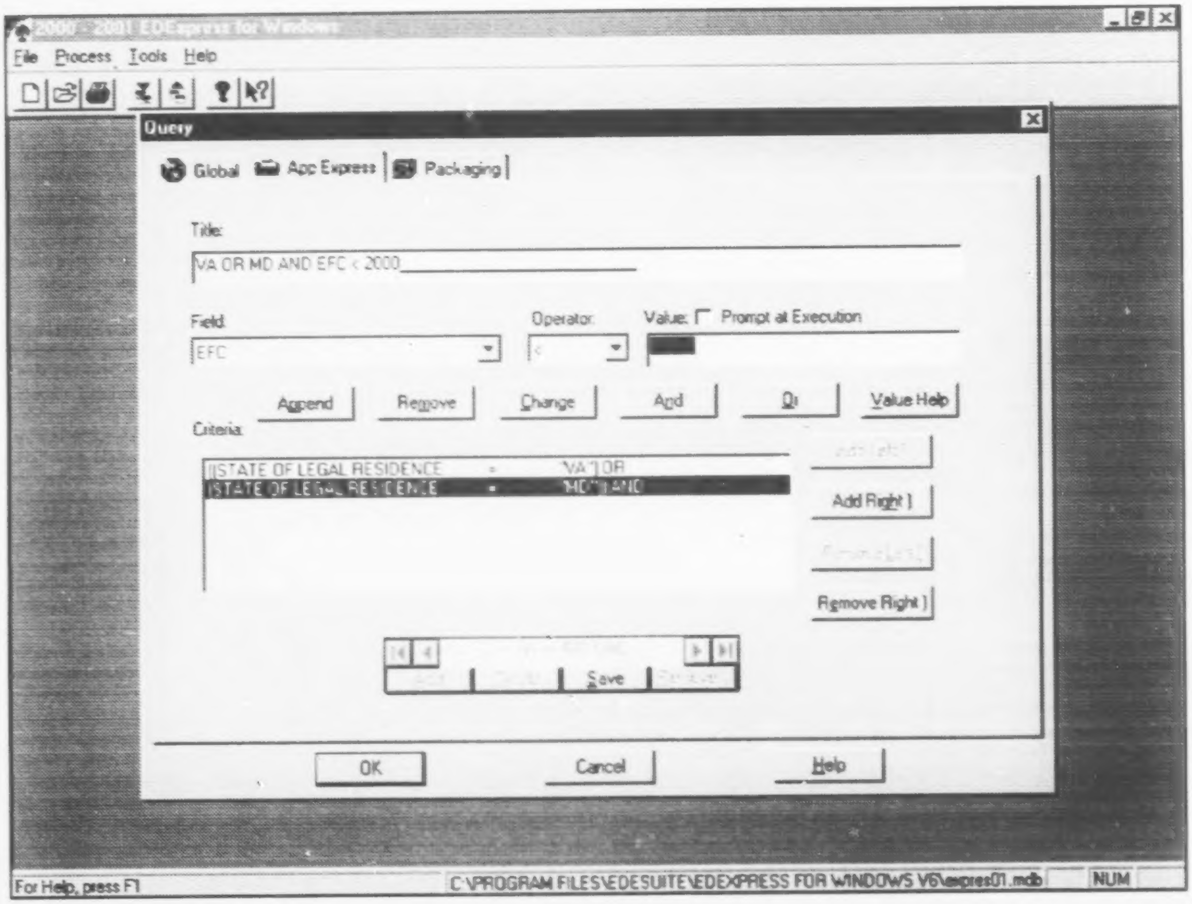
Select the operator ***less than*** *(<) and tab to the value field.*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Title: VA OR MD AND EFC < 2000

Field: EFC

Operator: <

Value: ☐ Prompt at Execution

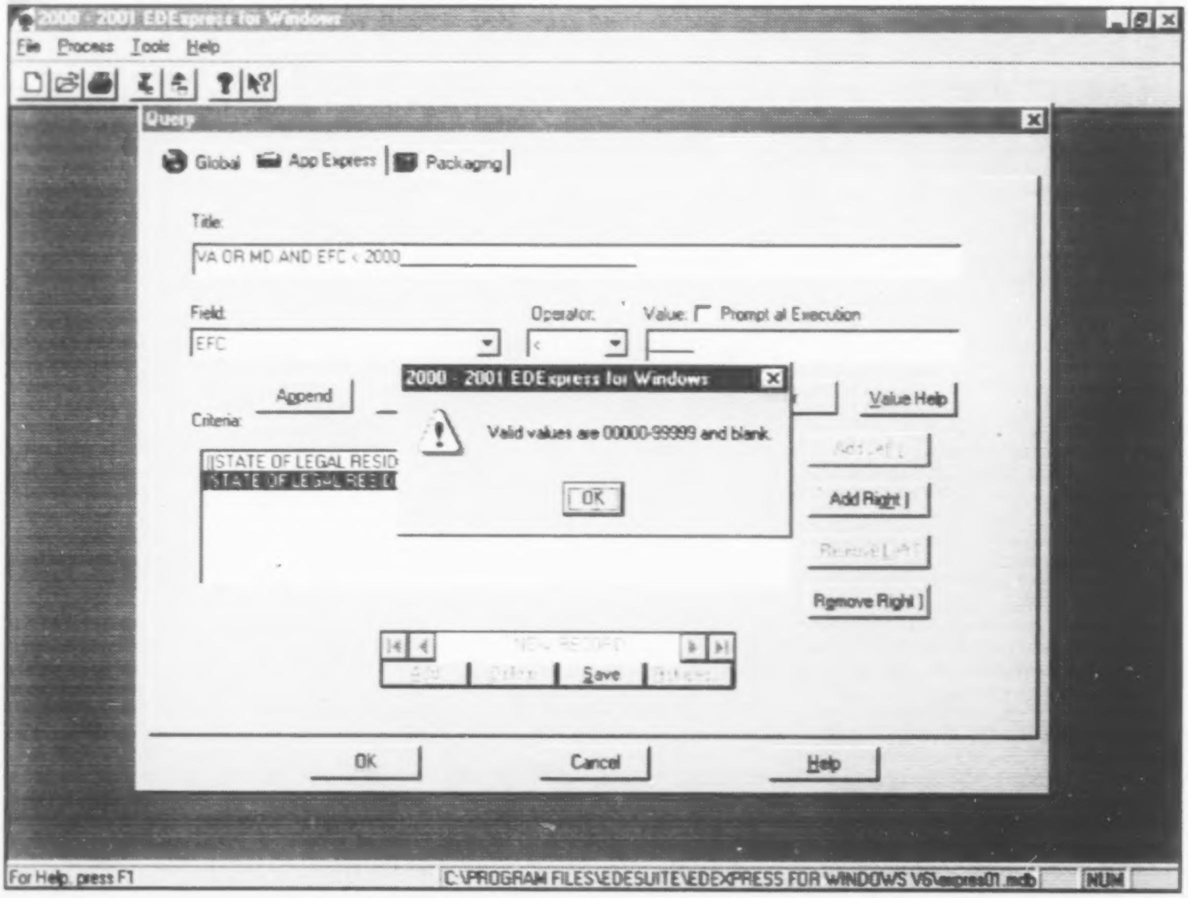
Criteria:

((STATE OF LEGAL RESIDENCE = 'VA') OR
(STATE OF LEGAL RESIDENCE = 'MD') AND

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

If you don't know what the value is for this field, click the ***Value Help*** *button.*

Click ***OK*** *to close the value help pop-up window.*



Title: VA OR MD AND EFC < 2000

Field: EFC

Operator: <

Value: ☐ Prompt at Execution

Criteria:

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STATE OF LEGAL RES D

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Valid values are 00000-99999 and blank.

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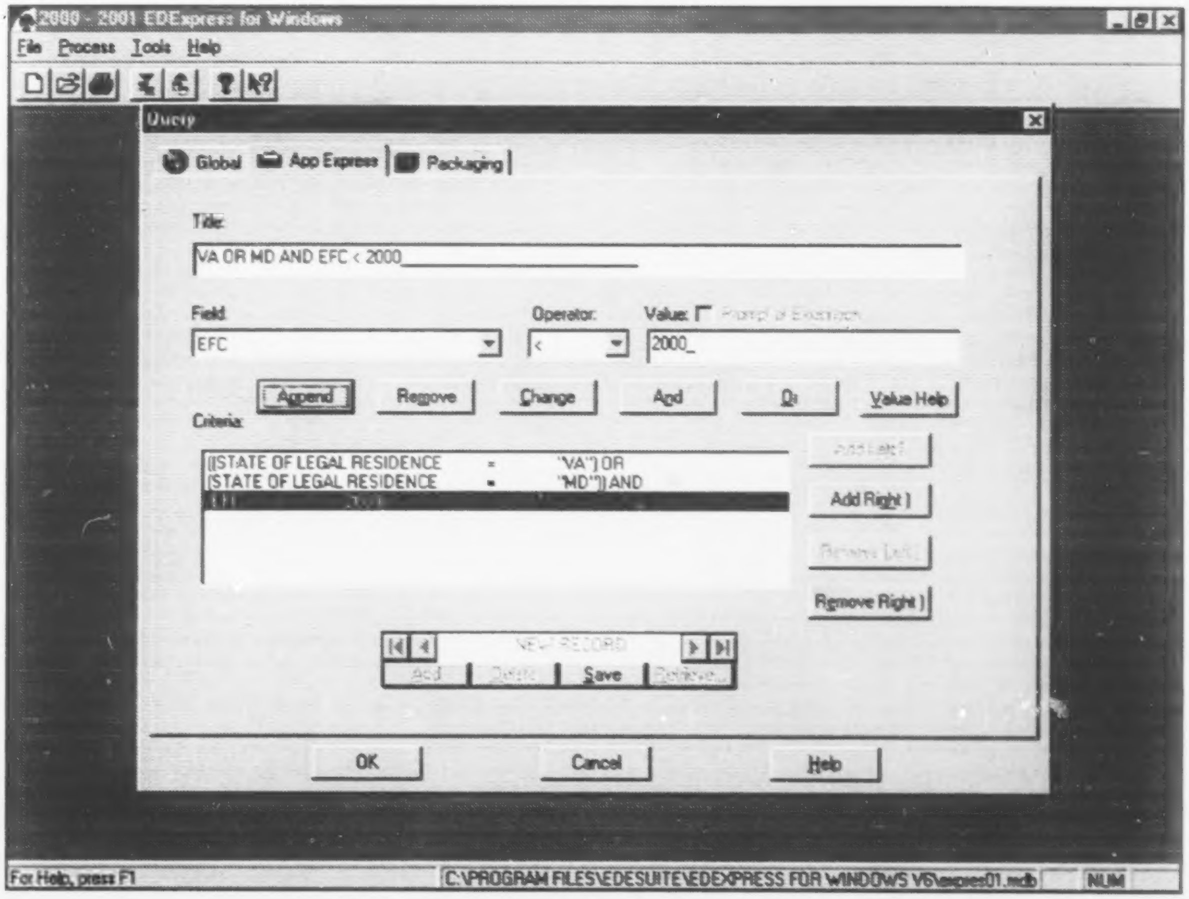
The completed query will identify students that live in Virginia or Maryland with an EFC of less than 2000.

*Enter **2000** in the value field.*

*Click the **Append** button to add the statement to the query.*



Title: VA OR MD AND EFC < 2000

Field: EFC

Operator: <

Value: 2000

Criteria:

```
((STATE OF LEGAL RESIDENCE        =        "VA") OR
(STATE OF LEGAL RESIDENCE         =        "MD")) AND
```

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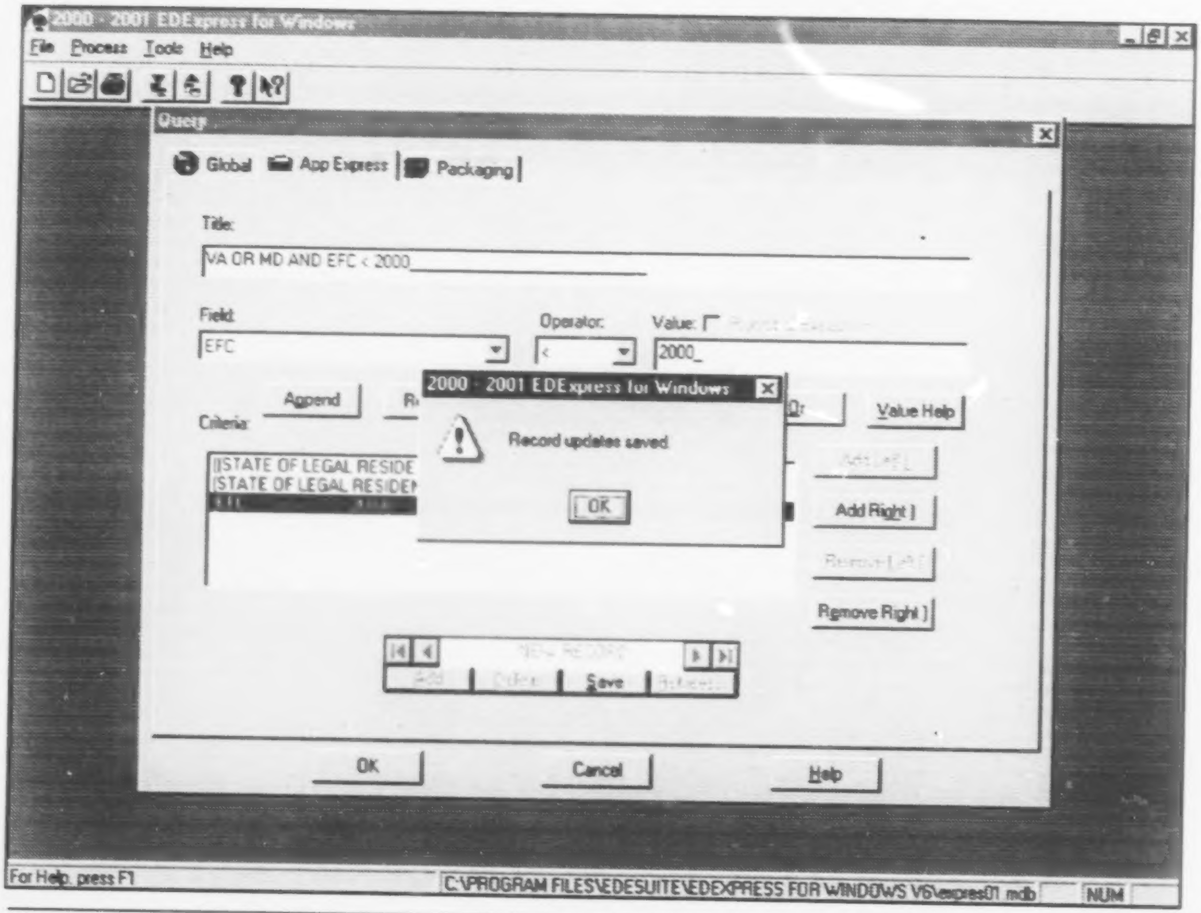
*Click **Save** to save the query.*

The final step is to save the query to the database



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Title: VA OR MD AND EFC < 2000

Field: EFC

Operator: <

Value: 2000

Criteria:

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2000 - 2001 EDExpress for Windows

Record updates saved

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Query Worksheet

In the space below, describe the group of students to be selected

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value
And ☐ Or ☐	Left (☐ Right) ☐	
And ☐ Or ☐	Left (☐ Right) ☐	
And ☐ Or ☐	Left (☐ Right) ☐	
And ☐ Or ☐	Left (☐ Right) ☐	
And ☐ Or ☐	Left (☐ Right) ☐	

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Query Worksheet

In the space below, describe the group of students to be selected

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value
And ☐ Or ☐	Left (☐ Right) ☐	
And ☐ Or ☐	Left (☐ Right) ☐	
And ☐ Or ☐	Left (☐ Right) ☐	
And ☐ Or ☐	Left (☐ Right) ☐	
And ☐ Or ☐	Left (☐ Right) ☐	

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Appendix B

Materials for Exercises

Free Application for Federal Student Aid

OMB 1545-0001

July 1, 2000 — June 30, 2001 school year

Step One: For questions 1-36, leave blank any questions that do not apply to you (the student).

1-3. Your full name (as it appears on your Social Security card)
1. LAST NAME: STEWART
2. FIRST NAME: JOSEPH
3. M.I.: F

4-7. Your permanent mailing address
4. NUMBER AND STREET (INCLUDE APARTMENT NUMBER): 9821 MCNAIR Drive
5. CITY (AND COUNTRY, IF NOT U.S.): ARLINGTON
6. STATE: VA
7. ZIP CODE: 22203

8. Your Social Security Number: 231 76 0427

9. Your date of birth: MONTH 07 / DAY 07 / YEAR 1980

10. Your permanent telephone number: AREA CODE 703 284-0511

11. Do you have a driver's license? Yes ● 1 No ○ 2

12-13. Driver's license number and state
12. LICENSE NUMBER: 2317604 27
13. STATE: VA

14. Are you a U.S. citizen? Pick one. **See Page 2.**
a. Yes, I am a U.S. citizen. ● 1
b. No, but I am an eligible noncitizen. Fill in question 15. ○ 2
c. No, I am not a citizen or eligible noncitizen. ○ 3

15. ALIEN REGISTRATION NUMBER: A

16. Marital status as of today
I am single, divorced, or widowed. ● 1
I am married. ○ 2
I am separated. ○ 3

17. Month and year you were married, separated, divorced, or widowed: MONTH / YEAR

For each question (18 - 22), please mark whether you will be full time, 3/4 time, half time, less than half time, or not attending. Mark "Full time" if you are not sure. See page 2.

18. Summer 2000	Full time ○ 1	3/4 time ○ 2	Half time ○ 3	Less than half time ○ 4	Not attending ● 5
19. Fall semester or quarter 2000	Full time ● 1	3/4 time ○ 2	Half time ○ 3	Less than half time ○ 4	Not attending ○ 5
20. Winter quarter 2000-2001	Full time ● 1	3/4 time ○ 2	Half time ○ 3	Less than half time ○ 4	Not attending ○ 5
21. Spring semester or quarter 2001	Full time ● 1	3/4 time ○ 2	Half time ○ 3	Less than half time ○ 4	Not attending ○ 5
22. Summer 2001	Full time ○ 1	3/4 time ○ 2	Half time ● 3	Less than half time ○ 4	Not attending ○ 5
23. Highest school your father completed	Middle school/Jr. High ○ 1	High school ○ 2	College or beyond ● 3	Other/unknown ○ 4	
24. Highest school your mother completed	Middle school/Jr. High ○ 1	High school ○ 2	College or beyond ● 3	Other/unknown ○ 4	

25. What is your state of legal residence? STATE: VA

26. Did you become a legal resident of this state before January 1, 1995? Yes ● 1 No ○ 2

27. If the answer to question 26 is **"No,"** give month and year you became a legal resident. MONTH / YEAR

28. If you have **never** been convicted of any illegal drug offense, enter "1" in the box and go to question 29. A drug-related conviction does not necessarily make you ineligible for aid; call 1-800-433-3243 or go to http://www.fafsa.ed.gov/q28 to find out how to fill out this question. 1

29. Most male students must register with Selective Service to get federal aid. Are you male? Yes ● 1 No ○ 2

30. If you are male (age 18-25) and not registered, do you want Selective Service to register you? Yes ○ 1 No ● 2

31. What degree or certificate will you be working towards during 2000-2001? **See page 2** and enter the correct number in the box. 1

32. What will be your grade level when you begin the 2000-2001 school year? **See page 2** and enter the correct number in the box. 1

33. Will you have a high school diploma or GED before you enroll? Yes ● 1 No ○ 2

34. Will you have your first bachelor's degree before July 1, 2000? Yes ○ 1 No ● 2

35. In addition to grants, are you interested in student loans (which you must pay back)? Yes ● 1 No ○ 2

36. In addition to grants, are you interested in "work-study" (which you earn through work)? Yes ○ 1 No ● 2

Step Two: For 37-51, if you (the student) are now married (even if you were not married in 1999), report both your and your spouse's income and assets. Ignore references to "spouse" if you are currently single, separated, divorced, or widowed.

37. For 1999, have you filed your IRS income tax return or another tax return listed in **question 38**?

a. I have already filed. ○ 1 **b.** I will file, but I have not yet filed. ● 2 **c.** I'm not going to file. (Skip to question 44.) ○ 3

38. What income tax return did you file or will you file for 1999?

a. IRS 1040 ○ 1
b. IRS 1040A, 1040EZ, 1040Telefile ● 2
c. A foreign tax return. **See Page 2.** ○ 3
d. A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau. **See Page 2.** ○ 4

39. If you have filed or will file a 1040, were you eligible to file a 1040A or 1040EZ? **See page 2.** Yes ○ 1 No/don't know ○ 2

For questions 40-53, if the answer is zero or the question does not apply to you, enter 0.

40. What was your (and spouse's) adjusted gross income for 1999? Adjusted gross income is on IRS Form 1040–line 33; 1040A–line 18; 1040EZ–line 4; or Telefile–line I.	$ 12,000
41. Enter the total amount of your (and spouse's) income tax for 1999. Income tax amount is on IRS Form 1040–line 49 plus 51; 1040A–line 32; 1040EZ–line 10; or Telefile–line K.	$ 2,300
42. Enter your (and spouse's) exemptions. Exemptions are on IRS Form 1040–line 6d, or on Form 1040A–line 6d. For Form 1040EZ or Telefile, **see page 2.**	00
43. Enter your Earned Income Credit from IRS Form 1040–line 59a; 1040A–line 37a; 1040EZ–line 8a; or Telefile–line L.	$,
44-45. How much did you (and spouse) earn from working in 1999? Answer this question whether or not you filed a tax return. This information may be on your W-2 forms, or on IRS Form 1040–lines 7, 12, and 18; 1040A–line 7; or 1040EZ–line 1. Telefilers should use their W-2's. **You (44)**	$ 12,000
Your Spouse (45)	$,
46. Go to page 8 of this form; complete the column on the left of **Worksheet A**; enter student total here.	$, 0
47. Go to page 8 of this form; complete the column on the left of **Worksheet B**; enter student total here.	$, 0
48. Total current balance of cash, savings, and checking accounts	$ 5,000

For 49-51, if net worth is one million or more, enter $999,999. If net worth is negative, enter 0.

49. Current net worth of investments (investment value minus investment debt) **See page 2.**	$ 1,000
50. Current net worth of business (business value minus business debt) **See page 2.**	$, 0
51. Current net worth of investment farm (Don't include a farm that you live on and operate.)	$, 0
52-53. If you receive veterans education benefits, for **how many months** from July 1, 2000 through June 30, 2001 will you receive these benefits, and **what amount** will you receive per month? Do not include your spouse's veterans education benefits. **Months (52)**	
Amount (53)	$

Step Three: Answer all six questions in this step.

54. Were you born before January 1, 1977? Yes ○ 1 No ● 2
55. Will you be working on a degree beyond a bachelor's degree in school year 2000-2001? Yes ○ 1 No ● 2
56. As of today, are you married? (Answer yes if you are separated, but not divorced.) Yes ○ 1 No ● 2
57. Answer **"Yes"** if: (1) You have children who receive more than half of their support from you; **or**
(2) You have dependents (other than your children or spouse) who live with you and receive more than half of their support from you, now and through June 30, 2001. Yes ○ 1 No ● 2
58. Are you an orphan or ward of the court or were you a ward of the court until age 18? Yes ○ 1 No ● 2
59. Are you a veteran of the U.S. Armed Forces? **See page 2.** Yes ○ 1 No ● 2

If you (the student) answer "No" to every question in Step Three, go to Step Four.

If you answer "Yes" to any question in Step Three, skip Step Four and go to Step Five.

(If you are a graduate health profession student, you may be required to complete Step Four even if you answered "Yes" to any question in Step Three.)

Step Four: Complete this step if you (the student) answered "No" to all questions in Step Three. Please tell us about your parents. **See page 7 for who is considered a parent**

60. Parents' marital status as of today? (Pick one)	Married ● 1 Single ○ 2 Divorced/Separated ○ 3 Widowed ○ 4
61-62. Your father's Social Security Number and last name	61. FATHER'S/STEPFATHER'S SSN 226-44-1797 62. FATHER'S/STEPFATHER'S LAST NAME STEWART
63-64. Your mother's Social Security Number and last nam	63. MOTHER'S/STEPMOTHER'S SSN 438-76-0617 64. MOTHER'S/STEPMOTHER'S LAST NAME STEWART
65. How many people are in your parents' household? **See page 7.**	08
66. How many in question 65 **(exclude your parents)** will be college students between July 1, 2000, and June 30, 2001? **See page 7.**	1
67. What is your parents' state of legal residence?	STATE VA
68. Did your parents become legal residents of the state in question 67 before January 1, 1995?	Yes ● 1 No ○ 2
69. If the answer to question 68 is "No," give the month and year legal residency began for the parent who has lived in the state the longest.	MONTH ☐☐ / YEAR ☐☐☐☐
70. What is the age of your older parent?	48

71. For 1999, have your parents filed their IRS income tax return or another tax return listed in **question 72**?

a. My parents have already filed. ○ 1
b. My parents will file, but they have not yet filed. ● 2
c. My parents are not going to file. (Skip to question 78.) ○ 3

72. What income tax return did your parents file or will they file for 1999?

a. IRS 1040 ● 1
b. IRS 1040A, 1040EZ, 1040Telefile ○ 2
c. A foreign tax return. **See Page 2.** ○ 3
d. A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau. **See Page 2.** ○ 4

73. If your parents have filed or will file a 1040, were they eligible to file a 1040A or 1040EZ? **See page 2.** Yes ○ 1 No/don't know ● 2

For 74 - 85, if the answer is zero or the question does not apply, enter 0.

74. What was your parents' adjusted gross income for 1999? Adjusted gross income is on IRS Form 1040–line 33; 1040A–line 18; 1040EZ–line 4; or Telefile–line I.		$ 82,560
75. Enter the total amount of your parents' income tax for 1999. Income tax amount is on IRS Form 1040–line 49 plus 51; 1040A–line 32; 1040EZ–line 10; or Telefile–line K.		$ 13,750
76. Enter your parents' exemptions. Exemptions are on IRS Form 1040–line 6d or on Form 1040A–line 6d. For Form 1040EZ or Telefile, **see page 2.**		08
77. Enter your parents' Earned Income Credit from IRS Form 1040–line 59a; 1040A–line 37a; 1040EZ–line 8a; or Telefile–line L.		$, 0
78-79. How much did your parents earn from working in 1999? Answer this question whether or not your parents filed a tax return. This information may be on their W-2 forms, or on IRS Form 1040–lines 7, 12, and 18; 1040A–line 7; or 1040EZ–line 1. Telefilers should use their W-2's.	**Father/ Stepfather (78)**	$ 82,560
	Mother/ Stepmother (79)	$, 0
80. Go to page 8 of this form; complete the column on the right of **Worksheet A**; enter parent total here.		$ 4,000
81. Go to page 8 of this form; complete the column on the right of **Worksheet B**; enter parent total here.		$, 0
82. Total current balance of cash, savings, and checking accounts		$ 30,000

For 83–85, if net worth is one million or more, enter $999,999. If net worth is negative, enter 0.

83. Current net worth of investments (investment value minus investment debt) **See page 2.**	$, 0
84. Current net worth of business (business value minus business debt) **See page 2.**	$, 0
85. Current net worth of investment farm (Don't include a farm that your parents live on and operate.)	$, 0

Now go to Step Six.

BEST COPY AVAILABLE

Step Five: Complete this step only if you (the student) answered "Yes" to any question in Step Three.

86. How many people are in your (and your spouse's) household? **See page 7.** ☐☐

87. How many in question 86 will be college students between July 1, 2000, and June 30, 2001? **Do not include your parents. See page 7.** ☐

Step Six: Please tell us which schools should receive your information.

For each school (up to six), please provide the federal school code and your housing plans **(enter "1" for on campus, "2" for off campus, and "3" for with parents).** Look for the federal school codes on the Internet at **http://www.ed.gov/studentaid**, at your college financial aid office, at your public library, or by asking your high school guidance counselor. If you cannot get the federal school code, write in the complete name, address, city, and state of the college.

	Federal school code	OR Name of college	College street address and city	State	Housing Plans
88.	FIRST SCHOOL CODE 001001	TRI-CITY COLLEGE OF ASTROPHOTOGRAPHY			89. 1
90.	SECOND SCHOOL CODE 003754	Virginia Polytechnic Institute & STATE UNIV	222 BURRUSS HALL BLACKSBURG VA	VA	91. 1
92.	THIRD SCHOOL CODE 003749	GEORGE MASON Univ	4400 University DR FAIRFAX VA	VA	93. 1
94.	FOURTH SCHOOL CODE 003745	Univ of VIRGINIA	P.O. Box 9021 CHARLOTTESVILLE	VA	95. 1
96.	FIFTH SCHOOL CODE				97.
98.	SIXTH SCHOOL CODE				99.

Step Seven: Please read, sign, and date.

By signing this application, you agree, if asked, to provide information that will verify the accuracy of your completed form. This information may include a copy of your U.S. or state income tax form. Also, you certify that you (1) will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education, (2) are not in default on a federal student loan or have made satisfactory arrangements to repay it, (3) do not owe money back on a federal student grant or have made satisfactory arrangements to repay it, (4) will notify your school if you default on a federal student loan, and (5) understand that **the Secretary of Education has the authority to verify income reported on this application with the Internal Revenue Service.** If you purposely give false or misleading information, you may be fined $10,000, sent to prison, or both.

100. Date this form was completed.

MONTH 03 / DAY 01 / 2000 ● or 2001 ○

101. Student signature (Sign in box)

Joseph Stewart

Parent signature (one parent whose information is provided in Step Four.) (Sign in box)

Mary Stewart

If this form was filled out by someone other than you, your spouse, or your parent(s), that person must complete this part.

Preparer's Name and Firm ______________________

Address ______________________

102. Social Security # ☐☐☐-☐☐-☐☐☐☐

OR

103. Employer ID # ☐☐-☐☐☐☐☐☐☐

104. Signature and Date ______________________

SCHOOL USE ONLY

D/O ○ Federal School Code ☐☐☐☐☐☐

FAA SIGNATURE

MDE USE ONLY

Special Handle ☐-☐☐☐☐☐☐

Notes for questions **60–85** (page 5) **Step Four:** Who is considered a parent in this Step?

If your parents are both living and married to each other, answer the questions about them. (You will be providing information about two people.)

If your parent is widowed or single, answer the questions about that parent. (You will be providing information about one person.) If your widowed parent has remarried as of today, answer the questions about that parent and the person whom your parent married. (You will be providing information about two people.)

If your parents have divorced or separated, answer the questions about the parent you lived with more during the past 12 months. If you did not live with one parent more than the other, give answers about the parent who provided more financial support during the last 12 months, or during the most recent year that you actually were supported by a parent. (You will be providing information about one person.) If this parent has remarried as of today, answer the questions on the rest of this form about that parent and the person whom your parent married. (You will be providing information about two people.)

Notes for question **65** (page 5)

Include in your parents' household:

- yourself and your parents, and
- your parents' other children if (a) your parents will provide more than half of their support from July 1, 2000 through June 30, 2001 or (b) the children could answer "No" to every question in Step Three, and
- other people if they now live with your parents, your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2000 through June 30, 2001.

Notes for questions **66** (page 5) and **87** (page 6)

Count yourself as a college student even if you will attend college less than half time in 2000-2001. **Do not include your parents.** Include others only if they will attend at least half time in 2000-2001 in a program that leads to a college degree or certificate.

Notes for question **86** (page 6)

Include in your (and your spouse's) household:

- yourself (and your spouse, if you have one), and
- your children, if you will provide more than half of their support from July 1, 2000 through June 30, 2001, and
- other people if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2000 through June 30, 2001.

Information on the Privacy Act and use of your Social Security Number.

We use the information that you provide on this form to determine if you are eligible to receive federal student financial aid and the amount that you are eligible to receive. Section 483 of the Higher Education Act of 1965, as amended, gives us the authority to ask you and your parents these questions, and to collect the social security numbers of you and your parents.

State and institutional student financial aid programs may also use the information that you provide on this form to determine if you are eligible to receive state and institutional aid and the need that you have for such aid. Therefore, we will disclose the information that you provide on this form to each institution you list in questions 88–99, state agencies in your state of legal residence, and the state agencies of the states in which the colleges that you list in questions 88–99 are located.

If you are applying solely for federal aid, you must answer all of the following questions that apply to you: 1–9, 14–16, 25, 28–30, 33–34, 37–41, 43–51, 54–60, 65–67, 70–75, 77-87, and 100–101. If you do not answer these questions, you will not receive federal aid.

Without your consent, we may disclose information that you provide to entities under a published "routine use." Under such a routine use, we may disclose information to third parties that we have authorized to assist us in administering the above programs; to other federal agencies under computer matching programs, such as those with the Internal Revenue Service, Social Security Administration, Selective Service System, Immigration and Naturalization Service, and Veterans Administration; to your parents or spouse; and to members of Congress if you ask them to help you with student aid questions.

If the federal government, the U.S. Department of Education, or an employee of the U.S. Department of Education is involved in litigation, we may send information to the Department of Justice, or a court or adjudicative body, if the disclosure is related to financial aid and certain conditions are met. In addition, we may send your information to a foreign, federal, state, or local enforcement agency if the information that you submitted indicates a violation or potential violation of law, for which that agency has jurisdiction for investigation or prosecution. Finally, we may send information regarding a claim that is determined to be valid and overdue to a consumer reporting agency. This information includes identifiers from the record; the amount, status, and history of the claim; and the program under which the claim arose.

State Certification.

By submitting this application, you are giving your state financial aid agency permission to verify any statement on this form and to obtain income tax information for all persons required to report income on this form.

The Paperwork Reduction Act of 1995

The Paperwork Reduction Act of 1995 says that no one is required to respond to a collection of information unless it displays a valid OMB control number, which for this form is 1845-0001. The time required to complete this form is estimated to be one hour, including time to review instructions, search data resources, gather the data needed, and complete and review the information collection. If you have comments about this estimate or suggestions for improving this form, please write to: U.S. Department of Education, Washington DC 20202-4651.

Worksheets – Even though you may have few of these items, check carefully.

Do not mail these worksheets in with your application. Keep these worksheets with a copy of your application.

Worksheet A

For question **46**: Enter and add together all of the following that apply to you (and your spouse) in the column on the left. Enter the total amount in question 46 on page 4.

For question **80**: Enter and add together all of the following that apply to your parents in the column on the right (if you are required to complete Step 4 of the application). Enter the total amount in question 80 on page 5.

For question 46 **Student (and spouse)**	**Calendar Year 1999**	**For question 80** **Parent(s)**
$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including amounts reported on the W-2 Form in Box 13, codes D, E, F, G, H, and S. Include untaxed portions of 401(k) and 403(b) plans.	$ 2,000
$	Deductible IRA and/or Keogh payments: IRS Form 1040–total of lines 23 and 29; or 1040A–line 15	$ 2,000
$	Child support **received** for all children. Don't include foster care or adoption payments.	$
$	Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps.	$
$	Tax exempt interest income from IRS Form 1040–line 8b; or 1040A–line 8b	$
$	Foreign income exclusion from IRS Form 2555–line 43; or 2555EZ–line 18	$
$	Untaxed portions of pensions from IRS Form 1040–(line 15a minus 15b) plus (16a minus 16b); or 1040A–(line 10a minus 10b) plus (11a minus 11b) excluding rollovers	$
$	Credit for federal tax on special fuels from IRS Form 4136–line 9 – nonfarmers only	$
$	Social Security benefits received that were not taxed	$
$	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)	$
$	Workers' Compensation	$
$	Veterans noneducation benefits, such as Death Pension or Dependency & Indemnity Compensation (DIC)	$
$	Any other untaxed income and benefits, such as VA Educational Work-Study allowances, untaxed portions of Railroad Retirement Benefits, Black Lung Benefits, Refugee Assistance, etc. Don't include student aid, educational WIA (formerly JTPA) benefits, or benefits from flexible spending arrangements, e.g., cafeteria plans.	$
$	**Cash received**, or any money paid on your behalf, not reported elsewhere on this form	XXXXXXXXX
$	(Enter this amount in question 46.) (Enter this amount in question 80	$ 4,000
Student (and spouse) total		**Parent(s) total**

Worksheet B

For question **47**: Enter and add together all of the following that apply to you (and your spouse) in the column on the left. Enter the total amount in question 47 on page 4.

For question **81**: Enter and add together all of the following that apply to your parents in the column on the right (if you are required to complete Step 4 of the application). Enter the total amount in question 81 on page 5.

For question 47 **Student (and spouse)**	**Calendar Year 1999**	**For question 81** **Parent(s)**
$	Education credits (Hope and Lifetime Learning Tax Credits) from IRS Form 1040-line 44; or 1040A-line 29.	$
$	Child support **paid** because of divorce or separation. Do not include support for children in your (or your parents') household, as reported in question 86 (or question 65 for your parents).	$
$	Taxable earnings from Federal Work-Study or other need-based work programs	$
$	AmeriCorps awards — living allowances only	$
$	Student grant and scholarship aid (in excess of the tuition, fees, books, and supplies) that was reported to the IRS in question 40 for students and 74 for parents	$
$	(Enter this amount in question 47.) (Enter this amount in question 81.)	$
Student (and spouse) total		**Parent(s) total**

Free Application for Federal Student Aid

OMB 1845-0001

July 1, 2000 — June 30, 2001 school year

Step One: For questions 1-36, leave blank any questions that do not apply to you (the student).

1-3. Your full name (as it appears on your Social Security card)	1. LAST NAME: LARSON 2. FIRST NAME: LAUREN 3. M.I.: E
4-7. Your permanent mailing address	4. NUMBER AND STREET (INCLUDE APARTMENT NUMBER): 1456 ORCHARD DRIVE 5. CITY (AND COUNTRY, IF NOT U.S.): ARLINGTON 6. STATE: VA 7. ZIP CODE: 22203
8. Your Social Security Number	231-00-1917
9. Your date of birth	MONTH 05 / DAY 22 / YEAR 1981
10. Your permanent telephone number	AREA CODE 703 284-0511
11. Do you have a driver's license?	Yes ● 1 No ○ 2
12-13. Driver's license number and state	12. LICENSE NUMBER: 2317604Z7 13. STATE: VA
14. Are you a U.S. citizen? Pick one. **See Page 2.**	a. Yes, I am a U.S. citizen. ● 1 b. No, but I am an eligible noncitizen. Fill in question 15. ○ 2 c. No, I am not a citizen or eligible noncitizen. ○ 3
15. ALIEN REGISTRATION NUMBER	A
16. Marital status as of today	I am single, divorced, or widowed. ● 1 I am married. ○ 2 I am separated. ○ 3
17. Month and year you were married, separated, divorced, or widowed	MONTH / YEAR

For each question (18 - 22), please mark whether you will be full time, 3/4 time, half time, less than half time, or not attending. Mark "Full time" if you are not sure. See page 2.

18. Summer 2000	Full time ○ 1	3/4 time ○ 2	Half time ○ 3	Less than half time ○ 4	Not attending ● 5
19. Fall semester or quarter 2000	Full time ● 1	3/4 time ○ 2	Half time ○ 3	Less than half time ○ 4	Not attending ○ 5
20. Winter quarter 2000-2001	Full time ● 1	3/4 time ○ 2	Half time ○ 3	Less than half time ○ 4	Not attending ○ 5
21. Spring semester or quarter 2001	Full time ● 1	3/4 time ○ 2	Half time ○ 3	Less than half time ○ 4	Not attending ○ 5
22. Summer 2001	Full time ○ 1	3/4 time ○ 2	Half time ● 3	Less than half time ○ 4	Not attending ○ 5
23. Highest school your father completed	Middle school/Jr. High ○ 1	High school ○ 2	College or beyond ● 3	Other/unknown ○ 4	
24. Highest school your mother completed	Middle school/Jr. High ○ 1	High school ○ 2	College or beyond ● 3	Other/unknown ○ 4	

25. What is your state of legal residence? STATE: VA

26. Did you become a legal resident of this state before January 1, 1995? Yes ● 1 No ○ 2

27. If the answer to question 26 is **"No,"** give month and year you became a legal resident. MONTH / YEAR

28. If you have **never** been convicted of any illegal drug offense, enter "1" in the box and go to question 29. A drug-related conviction does not necessarily make you ineligible for aid; call 1-800-433-3243 or go to http://www.fafsa.ed.gov/q28 to find out how to fill out this question. 1

29. Most male students must register with Selective Service to get federal aid. Are you male? Yes ● 1 No ○ 2

30. If you are male (age 18-25) and not registered, do you want Selective Service to register you? Yes ○ 1 No ● 2

31. What degree or certificate will you be working towards during 2000-2001? **See page 2** and enter the correct number in the box. 1

32. What will be your grade level when you begin the 2000-2001 school year? **See page 2** and enter the correct number in the box. 1

33. Will you have a high school diploma or GED before you enroll? Yes ● 1 No ○ 2

34. Will you have your first bachelor's degree before July 1, 2000? Yes ○ 1 No ● 2

35. In addition to grants, are you interested in student loans (which you must pay back)? Yes ● 1 No ○ 2

36. In addition to grants, are you interested in "work-study" (which you earn through work)? Yes ○ 1 No ● 2

Step Two: For 37-51, if you (the student) are now married (even if you were not married in 1999), report both your and your spouse's income and assets. Ignore references to "spouse" if you are currently single, separated, divorced, or widowed.

37. For 1999, have you filed your IRS income tax return or another tax return listed in **question 38**?

a. I have already filed. ○ 1 b. I will file, but I have not yet filed. ● 2 c. I'm not going to file. (Skip to question 44.) ○ 3

38. What income tax return did you file or will you file for 1999?

a. IRS 1040 ○ 1
b. IRS 1040A, 1040EZ, 1040Telefile ● 2
c. A foreign tax return. See Page 2. ○ 3
d. A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau. See Page 2. ○ 4

39. If you have filed or will file a 1040, were you eligible to file a 1040A or 1040EZ? **See page 2.** Yes ○ 1 No/don't know ○ 2

For questions 40-53, if the answer is zero or the question does not apply to you, enter 0.

40. What was your (and spouse's) adjusted gross income for 1999? Adjusted gross income is on IRS Form 1040–line 33; 1040A–line 18; 1040EZ–line 4; or Telefile–line I. $ 3,475

41. Enter the total amount of your (and spouse's) income tax for 1999. Income tax amount is on IRS Form 1040–line 49 plus 51; 1040A–line 32; 1040EZ–line 10; or Telefile–line K. $,680

42. Enter your (and spouse's) exemptions. Exemptions are on IRS Form 1040–line 6d, or on Form 1040A–line 6d. For Form 1040EZ or Telefile, **see page 2.** 01

43. Enter your Earned Income Credit from IRS Form 1040–line 59a; 1040A–line 37a; 1040EZ–line 8a; or Telefile–line L. $, 0

44-45. How much did you (and spouse) earn from working in 1999? Answer this question whether or not you filed a tax return. This information may be on your W-2 forms, or on IRS Form 1040–lines 7, 12, and 18; 1040A–line 7; or 1040EZ–line 1. Telefilers should use their W-2's.

You (44) $ 3,475

Your Spouse (45) $,

46. Go to page 8 of this form; complete the column on the left of **Worksheet A**; enter student total here. $, 0

47. Go to page 8 of this form; complete the column on the left of **Worksheet B**; enter student total here. $, 0

48. Total current balance of cash, savings, and checking accounts $ 2,900

For 49-51, if net worth is one million or more, enter $999,999. If net worth is negative, enter 0.

49. Current net worth of investments (investment value minus investment debt) **See page 2.** $, 0

50. Current net worth of business (business value minus business debt) **See page 2.** $, 0

51. Current net worth of investment farm (Don't include a farm that you live on and operate.) $, 0

52-53. If you receive veterans education benefits, for **how many months** from July 1, 2000 through June 30, 2001 will you receive these benefits, and **what amount** will you receive per month? Do not include your spouse's veterans education benefits.

Months (52) 00

Amount (53) $ 000

Step Three: Answer all six questions in this step.

54. Were you born before January 1, 1977? Yes ○ 1 No ● 2
55. Will you be working on a degree beyond a bachelor's degree in school year 2000-2001? Yes ○ 1 No ● 2
56. As of today, are you married? (Answer yes if you are separated, but not divorced.) Yes ○ 1 No ● 2
57. Answer **"Yes"** if: (1) You have children who receive more than half of their support from you; **or** (2) You have dependents (other than your children or spouse) who live with you and receive more than half of their support from you, now and through June 30, 2001. Yes ○ 1 No ● 2
58. Are you an orphan or ward of the court or were you a ward of the court until age 18? Yes ○ 1 No ● 2
59. Are you a veteran of the U.S. Armed Forces? **See page 2.** Yes ○ 1 No ● 2

If you (the student) answer "No" to every question in Step Three, go to Step Four.

If you answer "Yes" to any question in Step Three, skip Step Four and go to Step Five.

(If you are a graduate health profession student, you may be required to complete Step Four even if you answered "Yes" to any question in Step Three.)

Step Four: Complete this step if you (the student) answered "No" to all questions in Step Three. Please tell us about your parents. **See page 7 for who is considered a parent.**

60. Parents' marital status as of today? (Pick one.) Married ● 1 Single ○ 2 Divorced/Separated ○ 3 Widowed ○ 4

61-62. Your father's Social Security Number and last name — 61. FATHER'S/STEPFATHER'S SSN: 233-46-2571 — 62. FATHER'S/STEPFATHER'S LAST NAME: LARSON

63-64. Your mother's Social Security Number and last name — 63. MOTHER'S/STEPMOTHER'S SSN: 226-11-6095 — 64. MOTHER'S/STEPMOTHER'S LAST NAME: LARSON

65. How many people are in your parents' household? **See page 7.** 04

66. How many in question 65 **(exclude your parents)** will be college students between July 1, 2000, and June 30, 2001? **See page 7.** 1

67. What is your parents' state of legal residence? STATE: VA

68. Did your parents become legal residents of the state in question 67 before January 1, 1995? Yes ● 1 No ○ 2

69. If the answer to question 68 is "No," give the month and year legal residency began for the parent who has lived in the state the longest. MONTH ☐☐ / YEAR ☐☐☐☐

70. What is the age of your older parent? 43

71. For 1999, have your parents filed their IRS income tax return or another tax return listed in **question 72**?

a. My parents have already filed. ○ 1 b. My parents will file, but they have not yet filed. ● 2 c. My parents are not going to file. (Skip to question 78.) ○ 3

72. What income tax return did your parents file or will they file for 1999?

a. IRS 1040 ● 1
b. IRS 1040A, 1040EZ, 1040Telefile ○ 2
c. A foreign tax return. See Page 2. ○ 3
d. A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau. See Page 2. ○ 4

73. If your parents have filed or will file a 1040, were they eligible to file a 1040A or 1040EZ? **See page 2.** Yes ○ 1 No/don't know ● 2

For 74 - 85, if the answer is zero or the question does not apply, enter 0.

74. What was your parents' adjusted gross income for 1999? Adjusted gross income is on IRS Form 1040–line 33; 1040A–line 18; 1040EZ–line 4; or Telefile–line I. $ 58,000

75. Enter the total amount of your parents' income tax for 1999. Income tax amount is on IRS Form 1040–line 49 plus 51; 1040A–line 32; 1040EZ–line 10; or Telefile–line K. $ 7,600

76. Enter your parents' exemptions. Exemptions are on IRS Form 1040–line 6d or on Form 1040A–line 6d. For Form 1040EZ or Telefile, **see page 2.** 04

77. Enter your parents' Earned Income Credit from IRS Form 1040–line 59a; 1040A–line 37a; 1040EZ–line 8a; or Telefile–line L. $, 0

78-79. How much did your parents earn from working in 1999? Answer this question whether or not your parents filed a tax return. This information may be on their W-2 forms, or on IRS Form 1040–lines 7, 12, and 18; 1040A–line 7; or 1040EZ–line 1. Telefilers should use their W-2's.
Father/Stepfather (78) $ 58,000
Mother/Stepmother (79) $,000

80. Go to page 8 of this form; complete the column on the right of **Worksheet A**; enter parent total here. $ 2,000

81. Go to page 8 of this form; complete the column on the right of **Worksheet B**; enter parent total here. $,000

82. Total current balance of cash, savings, and checking accounts $ 4,470

For 83–85, if net worth is one million or more, enter $999,999. If net worth is negative, enter 0.

83. Current net worth of investments (investment value minus investment debt) **See page 2.** $ 10,000

84. Current net worth of business (business value minus business debt) **See page 2.** $,000

85. Current net worth of investment farm (Don't include a farm that your parents live on and operate.) $,000

Now go to Step Six.

Step Five: Complete this step only if you (the student) answered "Yes" to any question in Step Three.

86. How many people are in your (and your spouse's) household? **See page 7.** ☐☐

87. How many in question 86 will be college students between July 1, 2000, and June 30, 2001? **Do not include your parents. See page 7.** ☐

Step Six: Please tell us which schools should receive your information.

For each school (up to six), please provide the federal school code and your housing plans (**enter "1" for on campus, "2" for off campus, and "3" for with parents**). Look for the federal school codes on the Internet at **http://www.ed.gov/studentaid**, at your college financial aid office, at your public library, or by asking your high school guidance counselor. If you cannot get the federal school code, write in the complete name, address, city, and state of the college.

	Federal school code	OR Name of college	College street address and city	State		Housing Plans
88.	FIRST SCHOOL CODE 003745	University of VIRGINIA	PO BOX 9021 Charlottesville	VA	89.	1
90.	SECOND SCHOOL CODE 003721	JAMES MADISON UNIVERSITY	SOUTH MAIN STREET HARRISONBURG	VA	91.	1
92.	THIRD SCHOOL CODE 001001	TRI CITY COLLEGE OF ASTROPHOTOGRAPHY			93.	
94.	FOURTH SCHOOL CODE				95.	
96.	FIFTH SCHOOL CODE				97.	
98.	SIXTH SCHOOL CODE				99.	

Step Seven: Please read, sign, and date.

By signing this application, you agree, if asked, to provide information that will verify the accuracy of your completed form. This information may include a copy of your U.S. or state income tax form. Also, you certify that you (1) will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education, (2) are not in default on a federal student loan or have made satisfactory arrangements to repay it, (3) do not owe money back on a federal student grant or have made satisfactory arrangements to repay it, (4) will notify your school if you default on a federal student loan, and (5) understand that **the Secretary of Education has the authority to verify income reported on this application with the Internal Revenue Service.** If you purposely give false or misleading information, you may be fined $10,000, sent to prison, or both.

100. Date this form was completed.

MONTH 03 / DAY 15 / 2000 ● or 2001 ○

101. Student signature (Sign in box)

Parent signature (one parent whose information is provided in Step Four.) (Sign in box)

If this form was filled out by someone other than you, your spouse, or your parent(s), that person must complete this part.

Preparer's Name and Firm ____________________

Address ____________________

102. Social Security # ☐☐☐-☐☐-☐☐☐☐

OR

103. Employer ID # ☐☐-☐☐☐☐☐☐☐

104. Signature and Date ____________________

SCHOOL USE ONLY

D/O ○ Federal School Code ☐☐☐☐☐☐

FAA SIGNATURE

MDE USE ONLY

Special Handle ☐-☐☐☐☐☐☐☐

Notes for questions **60–85** (page 5) **Step Four: Who is considered a parent in this Step?**

If your parents are both living and married to each other, answer the questions about them. (You will be providing information about two people.)

If your parent is widowed or single, answer the questions about that parent. (You will be providing information about one person.) If your widowed parent has remarried as of today, answer the questions about that parent and the person whom your parent married. (You will be providing information about two people.)

If your parents have divorced or separated, answer the questions about the parent you lived with more during the past 12 months. If you did not live with one parent more than the other, give answers about the parent who provided more financial support during the last 12 months, or during the most recent year that you actually were supported by a parent. (You will be providing information about one person.) If this parent has remarried as of today, answer the questions on the rest of this form about that parent and the person whom your parent married. (You will be providing information about two people.)

Notes for question **65** (page 5)

Include in your parents' household:

- yourself and your parents, and
- your parents' other children if (a) your parents will provide more than half of their support from July 1, 2000 through June 30, 2001 or (b) the children could answer "No" to every question in Step Three, and
- other people if they now live with your parents, your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2000 through June 30, 2001.

Notes for questions **66** (page 5) and **87** (page 6)

Count yourself as a college student even if you will attend college less than half time in 2000-2001. **Do not include your parents.** Include others only if they will attend at least half time in 2000-2001 in a program that leads to a college degree or certificate.

Notes for question **86** (page 6)

Include in your (and your spouse's) household:

- yourself (and your spouse, if you have one), and
- your children, if you will provide more than half of their support from July 1, 2000 through June 30, 2001, and
- other people if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2000 through June 30, 2001.

Information on the Privacy Act and use of your Social Security Number.

We use the information that you provide on this form to determine if you are eligible to receive federal student financial aid and the amount that you are eligible to receive. Section 483 of the Higher Education Act of 1965, as amended, gives us the authority to ask you and your parents these questions, and to collect the social security numbers of you and your parents.

State and institutional student financial aid programs may also use the information that you provide on this form to determine if you are eligible to receive state and institutional aid and the need that you have for such aid. Therefore, we will disclose the information that you provide on this form to each institution you list in questions 88–99, state agencies in your state of legal residence, and the state agencies of the states in which the colleges that you list in questions 88–99 are located.

If you are applying solely for federal aid, you must answer all of the following questions that apply to you: 1–9, 14–16, 25, 28–30, 33–34, 37–41, 43–51, 54–60, 65–67, 70–75, 77-87, and 100–101. If you do not answer these questions, you will not receive federal aid.

Without your consent, we may disclose information that you provide to entities under a published "routine use." Under such a routine use, we may disclose information to third parties that we have authorized to assist us in administering the above programs; to other federal agencies under computer matching programs, such as those with the Internal Revenue Service, Social Security Administration, Selective Service System, Immigration and Naturalization Service, and Veterans Administration; to your parents or spouse; and to members of Congress if you ask them to help you with student aid questions.

If the federal government, the U.S. Department of Education, or an employee of the U.S. Department of Education is involved in litigation, we may send information to the Department of Justice, or a court or adjudicative body, if the disclosure is related to financial aid and certain conditions are met. In addition, we may send your information to a foreign, federal, state, or local enforcement agency if the information that you submitted indicates a violation or potential violation of law, for which that agency has jurisdiction for investigation or prosecution. Finally, we may send information regarding a claim that is determined to be valid and overdue to a consumer reporting agency. This information includes identifiers from the record; the amount, status, and history of the claim; and the program under which the claim arose.

State Certification.

By submitting this application, you are giving your state financial aid agency permission to verify any statement on this form and to obtain income tax information for all persons required to report income on this form.

The Paperwork Reduction Act of 1995

The Paperwork Reduction Act of 1995 says that no one is required to respond to a collection of information unless it displays a valid OMB control number, which for this form is 1845-0001. The time required to complete this form is estimated to be one hour, including time to review instructions, search data resources, gather the data needed, and complete and review the information collection. If you have comments about this estimate or suggestions for improving this form, please write to: U.S. Department of Education, Washington DC 20202-4651.

Worksheets – Even though you may have few of these items, check carefully.

Do not mail these worksheets in with your application. Keep these worksheets with a copy of your application.

Worksheet A

For question **46**: Enter and add together all of the following that apply to you (and your spouse) in the column on the left. Enter the total amount in question 46 on page 4.

For question **80**: Enter and add together all of the following that apply to your parents in the column on the right (if you are required to complete Step 4 of the application). Enter the total amount in question 80 on page 5.

For question 46 **Student (and spouse)**	**Calendar Year 1999**	**For question 80** **Parent(s)**
$ 0	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including amounts reported on the W-2 Form in Box 13, codes D, E, F, G, H, and S. Include untaxed portions of 401(k) and 403(b) plans.	$ 2,000
$ 0	Deductible IRA and/or Keogh payments: IRS Form 1040–total of lines 23 and 29; or 1040A–line 15	$ 0
$ 0	Child support **received** for all children. Don't include foster care or adoption payments.	$ 0
$ 0	Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps.	$ 0
$ 0	Tax exempt interest income from IRS Form 1040–line 8b; or 1040A–line 8b	$ 0
$ 0	Foreign income exclusion from IRS Form 2555–line 43; or 2555EZ–line 18	$ 0
$ 0	Untaxed portions of pensions from IRS Form 1040–(line 15a minus 15b) plus (16a minus 16b); or 1040A–(line 10a minus 10b) plus (11a minus 11b) excluding rollovers	$ 0
$ 0	Credit for federal tax on special fuels from IRS Form 4136–line 9 – nonfarmers only	$ 0
$ 0	Social Security benefits received that were not taxed	$ 0
$ 0	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)	$ 0
$ 0	Workers' Compensation	$ 0
$ 0	Veterans noneducation benefits, such as Death Pension or Dependency & Indemnity Compensation (DIC)	$ 0
$ 0	Any other untaxed income and benefits, such as VA Educational Work-Study allowances, untaxed portions of Railroad Retirement Benefits, Black Lung Benefits, Refugee Assistance, etc. Don't include student aid, educational WIA (formerly JTPA) benefits, or benefits from flexible spending arrangements, e.g., cafeteria plans.	$ 0
$ 0	Cash **received**, or any money paid on your behalf, not reported elsewhere on this form	XXXXXXXXXX
$ 0	(Enter this amount in question 46.) (Enter this amount in question 80.)	$ 2,000
Student (and spouse) total		**Parent(s) total**

Worksheet B

For question **47**: Enter and add together all of the following that apply to you (and your spouse) in the column on the left. Enter the total amount in question 47 on page 4.

For question **81**: Enter and add together all of the following that apply to your parents in the column on the right (if you are required to complete Step 4 of the application). Enter the total amount in question 81 on page 5.

For question 47 **Student (and spouse)**	**Calendar Year 1999**	**For question 81** **Parent(s)**
$ 0	Education credits (Hope and Lifetime Learning Tax Credits) from IRS Form 1040-line 44; or 1040A-line 29.	$ 0
$ 0	Child support **paid** because of divorce or separation. Do not include support for children in your (or your parents') household, as reported in question 86 (or question 65 for your parents).	$ 0
$ 0	Taxable earnings from Federal Work-Study or other need-based work programs	$ 0
$ 0	AmeriCorps awards — living allowances only	$ 0
$ 0	Student grant and scholarship aid (in excess of the tuition, fees, books, and supplies) that was reported to the IRS in question 40 for students and 74 for parents	$ 0
$ 0	(Enter this amount in question 47.) (Enter this amount in question 81.)	$ 0
Student (and spouse) total		**Parent(s) total**

Form **1040A** Department of the Treasury—Internal Revenue Service

U.S. Individual Income Tax Return (99) **1999** IRS Use Only—Do not write or staple in this space.

OMB No. 1545-0085

Label (See page 19.)

Use the IRS label. Otherwise, please print or type.

LABEL HERE

Your first name and initial: Kerry A.
Last name: Kobles
Your social security number: 999 58 4752

If a joint return, spouse's first name and initial:
Last name:
Spouse's social security number:

Home address (number and street). If you have a P.O. box, see page 20: 483 Stardmore Ave. #252
Apt. no.

City, town or post office, state, and ZIP code. If you have a foreign address, see page 20: metropolitan Sc 99019

▲ IMPORTANT! ▲ You **must** enter your SSN(s) above.

Presidential Election Campaign Fund (See page 20.)

	Yes	No
Do you want $3 to go to this fund?	☒	☐
If a joint return, does your spouse want $3 to go to this fund?	☐	☐

Note. Checking "Yes" will not change your tax or reduce your refund.

Filing status

Check only one box.

1 ☐ Single
2 ☐ Married filing joint return (even if only one had income)
3 ☐ Married filing separate return. Enter spouse's social security number above and full name here. ▶
4 ☑ Head of household (with qualifying person). (See page 21.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
5 ☐ Qualifying widow(er) with dependent child (year spouse died ▶ 19). (See page 22.)

Exemptions

6a ☐ **Yourself.** If your parent (or someone else) can claim you as a dependent on his or her tax return, **do not** check box 6a.
b ☐ **Spouse**

No. of boxes checked on 6a and 6b: 1

c **Dependents:**

If more than seven dependents, see page 22.

(1) First name Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) ✓ if qualifying child for child tax credit (see page 23)
Kathy Kobles	212 44 6723	daughter	☐
			☐
			☐
			☐
			☐
			☐
			☐

No. of your children on 6c who:
- lived with you: 1
- did not live with you due to divorce or separation (see page 24):

Dependents on 6c not entered above:

d Total number of exemptions claimed.

Add numbers entered on lines above: 2

Income

Attach Copy B of your Form(s) W-2 here. Also attach Form(s) 1099-R if tax was withheld.

If you did not get a W-2, see page 25.

Enclose, but do not staple, any payment.

7	Wages, salaries, tips, etc. Attach Form(s) W-2.	7	177450 00
8a	**Taxable** interest. Attach Schedule 1 if required.	8a	
b	**Tax-exempt** interest. DO NOT include on line 8a. 8b		
9	Ordinary dividends. Attach Schedule 1 if required.	9	
10a	Total IRA distributions. 10a — **10b** Taxable amount (see page 25).	10b	
11a	Total pensions and annuities. 11a — **11b** Taxable amount (see page 26).	11b	
12	Unemployment compensation, qualified state tuition program earnings, and Alaska Permanent Fund dividends.	12	
13a	Social security benefits. 13a — **13b** Taxable amount (see page 28).	13b	
14	Add lines 7 through 13b (far right column). This is your **total income.** ▶	14	177450 00

Adjusted gross income

15	IRA deduction (see page 30). 15		
16	Student loan interest deduction (see page 30). 16		
17	Add lines 15 and 16. These are your **total adjustments.**	17	
18	Subtract line 17 from line 14. This is your **adjusted gross income.** ▶	18	177450 00

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 53. Cat. No. 11327A Form **1040A** (1999)

Taxable income	**19**	Enter the amount from line 18.		19	177450 | 00
	20a	Check if: ☐ **You** were 65 or older ☐ Blind ☐ **Spouse** was 65 or older ☐ Blind **Enter number of boxes checked** ▶ 20a ☐			
	b	If you are married filing separately and your spouse itemizes deductions, see page 32 and check here . . . . ▶ 20b ☐			
	21	Enter the **standard deduction** for your filing status. **But** see page 33 if you checked any box on line 20a or 20b **OR** if someone can claim you as a dependent. • Single—$4,300 • Married filing jointly or Qualifying widow(er)—$7,200 • Head of household—$6,350 • Married filing separately—$3,600		21	6350 | 00
	22	Subtract line 21 from line 19. If line 21 is more than line 19, enter -0-.		22	171100 | 00
	23	Multiply $2,750 by the total number of exemptions claimed on line 6d.		23	5500 | 00
	24	Subtract line 23 from line 22. If line 23 is more than line 22, enter -0-. This is your **taxable income.** ▶		24	165600 | 00
Tax, credits, and payments	**25**	Find the tax on the amount on line 24 (see page 34).		25	16760 | 00
	26	Credit for child and dependent care expenses. Attach Schedule 2.	26		
	27	Credit for the elderly or the disabled. Attach Schedule 3.	27		
	28	Child tax credit (see page 35).	28		
	29	Education credits. Attach Form 8863.	29		
	30	Adoption credit. Attach Form 8839.	30		
	31	Add lines 26 through 30. These are your **total credits.**		31	
	32	Subtract line 31 from line 25. If line 31 is more than line 25, enter -0-.		32	
	33	Advance earned income credit payments from Form(s) W-2.		33	
	34	Add lines 32 and 33. This is your **total tax.** ▶		34	16760 | 00
	35	Total Federal income tax withheld from Forms W-2 and 1099.	35 22358		
	36	1999 estimated tax payments and amount applied from 1998 return.	36		
	37a	**Earned income credit.** Attach Schedule EIC if you have a qualifying child.	37a		
	b	Nontaxable earned income: amount ▶ and type ▶			
	38	Additional child tax credit. Attach Form 8812.	38		
	39	Add lines 35, 36, 37a, and 38. These are your **total payments.** ▶		39	22358 | 00
Refund Have it directly deposited! See page 47 and fill in 41b, 41c, and 41d.	**40**	If line 39 is more than line 34, subtract line 34 from line 39. This is the amount you **overpaid.**		40	5598 | 00
	41a	Amount of line 40 you want **refunded to you.**		41a	5598 | 00
	▶ **b**	Routing number 483217849 ▶ **c** Type: ☑ Checking ☐ Savings			
	▶ **d**	Account number 48721784966275451			
	42	Amount of line 40 you want **applied to your 2000 estimated tax.**	42		
Amount you owe	**43**	If line 34 is more than line 39, subtract line 39 from line 34. This is the **amount you owe.** For details on how to pay, see page 48.		43	
	44	Estimated tax penalty (see page 48).	44		

Sign here

Joint return? See page 20. Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and accurately list all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.

Your signature Kenny Kubler	Date 2/1/2000	Your occupation Oil Rigger	Daytime telephone number (optional) (555)555-5842
Spouse's signature. If joint return, BOTH must sign	Date	Spouse's occupation	

Paid preparer's use only

Preparer's signature ▶	Date	Check if self-employed ☐	Preparer's SSN or PTIN
Firm's name (or yours if self-employed) and address ▶			EIN
			ZIP code

Independent

U.S. Department of Education

2000-2001 Verification Worksheet

Federal Student Aid Programs

FORM APPROVED
OMB NO. 1840-0570
EXP. DATE 12/31/2001

Your application was selected for review in a process called "Verification." In this process, your school will be comparing information from your application with signed copies of your (and your spouse's, if you are married) 1999 Federal tax forms, or with W-2 forms or other financial documents. The law says we have the right to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, you may need to send in corrections on your Student Aid Report (SAR), or your school may send corrections electronically, to have your information reprocessed.

Try to complete verification as soon as possible, so that your financial aid won't be delayed. Your financial aid administrator will help you.

What you should do

1. Collect your (and your spouse's) financial documents (signed Federal income tax forms, W-2 forms, etc.).
2. Talk to your financial aid administrator if you have questions about completing this worksheet.
3. Fill in and sign the worksheet.
4. Take the completed worksheet, tax forms, and any other documents your school needs to your financial aid administrator.
5. Your financial aid administrator will compare information on the documents. You may need to make corrections on your SAR and send it back to the application processor.

Your school must review the requested information, under the financial aid program rules (CFR Title 34, Part 668).

A. Student Information

Last name: Kobles First name: Kerry M.I.: A.
Social Security Number: 999-58-4752
Address (include apt. no.): 483 Stardmore Avenue #252
Date of birth: 06-26-1963
City, State: Metropolitan, SC ZIP code: 99019
Phone number (include area code): 555-555-5847

B. Family Information

List the people in your household; include:

- yourself, and your spouse if you have one, and
- your children, if you provide more than half of their support from July 1, 2000 through June 30, 2001, and
- other people if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2000 through June 30, 2001.

Write the names of all household members. Also write in the name of the college for any household member, excluding your parent(s), who will be attending college at least half-time between July 1, 2000 and June 30, 2001, and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
Martha Jones (example)	24	Wife	City University
Kerry A. Kobles	37	Self	Tri-city College of Astrophotography
Kathy M. Kobles	4	Daughter	

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 1840-0570. The time required to complete this information collection is estimated to average twelve minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: U.S. Department of Education, Washington, DC 20202-4651. If you have comments or concerns regarding the status of your individual submission of this form, write directly to: Application and Pell Processing Systems Division, U.S. Department of Education, 400 Maryland Avenue, S.W., Washington, DC 20202-5453.

C. Student's Tax Forms and Income Information (all applicants) **Independent**

1. Check one box only. Tax returns include the 1999 IRS Form 1040, 1040A, 1040EZ, TeleFile Tax Record, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return, request a copy from your tax preparer or a copy of an Internal Revenue Service form that lists tax account information.
   - ☐ Check and attach signed tax return.
   - ☐ Check and complete: signed tax return will be submitted to the school by ______________ (date).
   - ☐ Check if you will not file and are not required to file a 1999 U.S. Income Tax Return.
2. Amounts received for child support and other untaxed income. (See Worksheet A of the Free Application for Federal Student Aid)

Sources of Untaxed Income	Amount	Sources of Untaxed Income	Amount
a. Child Support		d.	
b. Social Security (non-taxed)		e.	
c. Welfare (including TANF)		f.	

3. If you did not file and are not required to file a 1999 Federal income tax return, list below your employer(s) and any income received in 1999.

Sources (Use the W-2 form or other earnings statements.)	Amount

D. Spouse's Tax Forms and Income Information (If student is married)

1. Check one box only. Tax returns include the 1999 IRS Form 1040, 1040A, 1040EZ, TeleFile Tax Record, a tax return from Puerto Rico or a foreign income tax return. If your spouse did not keep a copy of the tax return, request a copy from the tax preparer or a copy of an Internal Revenue Service form that lists tax account information.
   - ☐ Check if you and your spouse did or will file a joint return.
   - ☐ Check and attach signed tax return if your spouse filed a separate return.
   - ☐ Check and complete: signed tax return will be submitted to the school by ______________ (date).
   - ☐ Check if your spouse will not file and is not required to file a 1999 U.S. Income Tax Return.
2. Amounts received for child support and other untaxed income. (See Worksheet A of the Free Application for Federal Student Aid)

Sources of Untaxed Income	Amount	Sources of Untaxed Income	Amount
a. Child Support		d.	
b. Social Security (non-taxed)		e.	
c. Welfare (including TANF)		f.	

3. If your spouse did not file and is not required to file a 1999 Federal income tax return, list below your spouse's employer(s) and any income received in 1999.

Sources (Use the W-2 form or other earnings statements.)	Amount

E. Sign this Worksheet

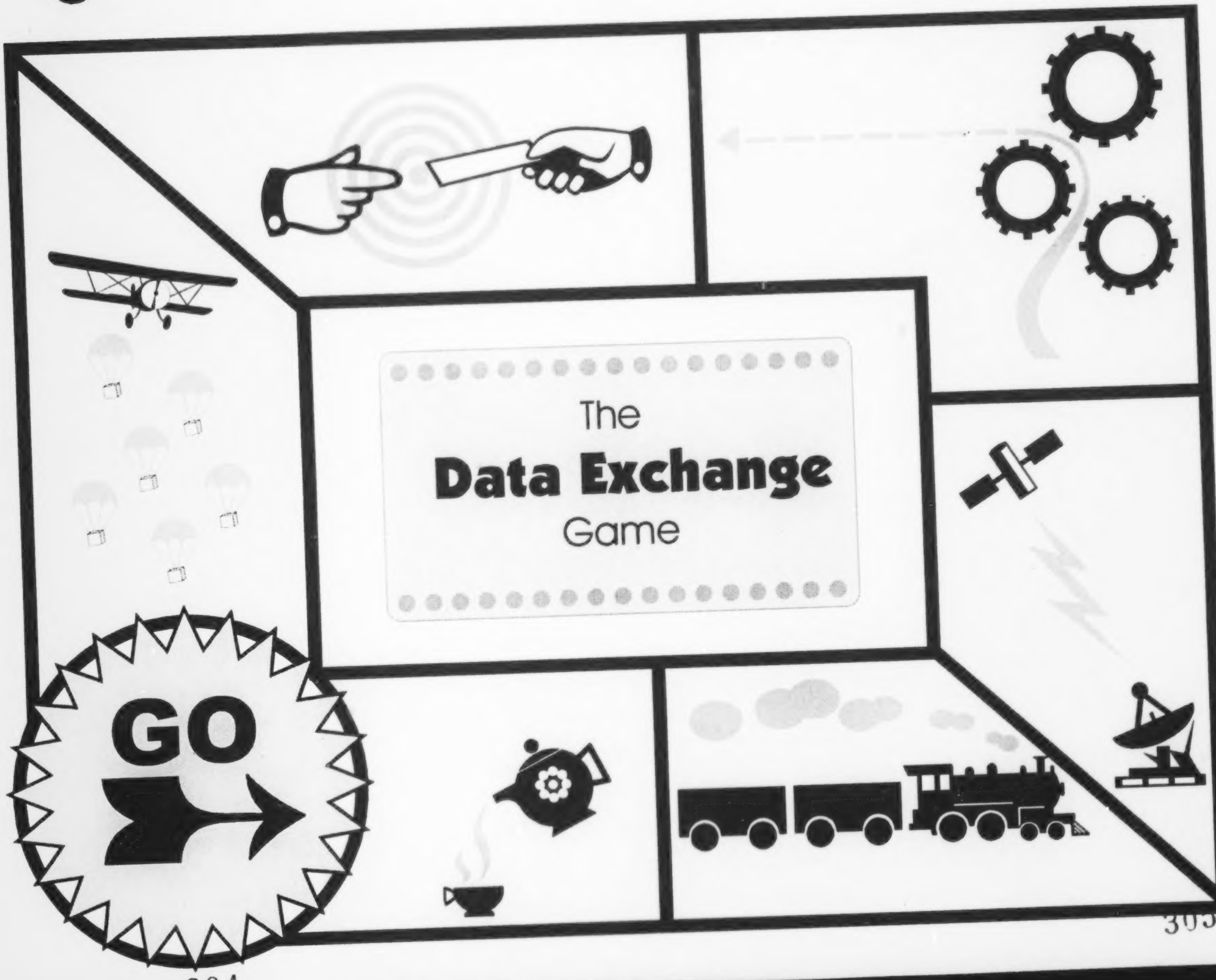
By signing this worksheet, I (we) certify that all the information reported on this worksheet is complete and correct. If married, spouse's signature is optional.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Kerry J. Kolles 3/15/2000
Student Date

Spouse Date

Do not mail this worksheet to your application processor. Take it to your Financial Aid Administrator at your school. Don't forget to sign your tax forms.


The
Data Exchange
Game
GO

EDExpress		Edconn32				EDExpress	
Batch ID#	Export File Name (Message Class) {Date}	File Transmitted {Initials}	Date Sent	Received File Name [Message Class] {Date}	Date Rec'd	File Imported {Initials}	Date Imported

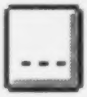
Appendix C

Toolbars

EDExpress Toolbar Buttons

Ellipsis Button

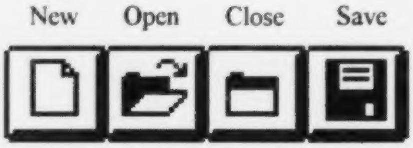
For data fields that have a selection of values that are predefined and stored in a table, clicking on an ellipsis button will display a dialog box listing the values in the table.



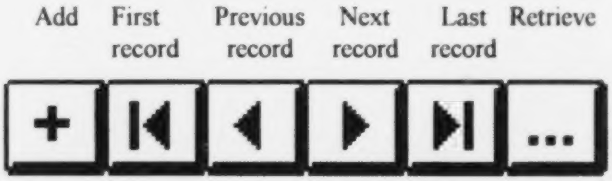
Toolbar

The Toolbar provides buttons that you click on to access features that are also accessible via pull-down menus. Just as in the menu navigation, toolbars display only functions according to global anda record levels. This is called dynamic functionality. Different toolbars display depending upon what you are doing.

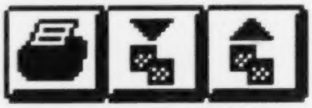
The toolbar buttons below perform functions that are also available in the File menu, both globally and within a student record.



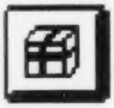
The toolbar buttons below perform functions that are also available in the Record menu within the SAR/ISIR tab.



The toolbar buttons below perform functions that are also available in the File menu.

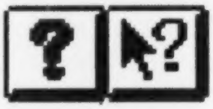


This button performs packaging functions that are also available in the Process menu within the Awards tab.



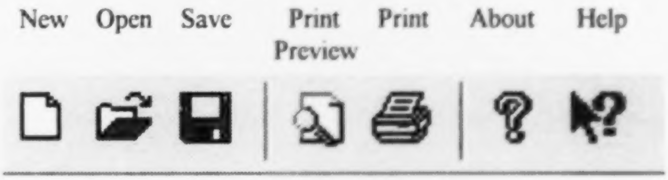
The 1, 2, and 3 buttons are used to move through pages within a record on both the FAFSA and SAR/ISIR tabs.

The following two buttons access the Help menu. The question mark button opens the About EDExpress for Windows... function. The button with the arrow and question mark is the What's This button. To view Help for a specific item, click the What's This button and then click the item.

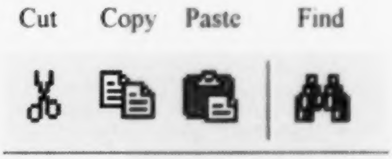


EDconn32 Toolbar Buttons

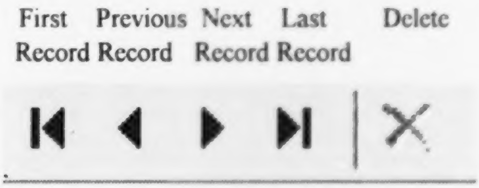
The toolbar buttons below perform functions that are also available in the File menu, both globally and within a student record.


New
Open
Save
Print Preview
Print
About
Help

The toolbar buttons below perform basic Windows editing functions that are also available in the Edit menu. The allow you to cut, copy and paste from and into other applications.

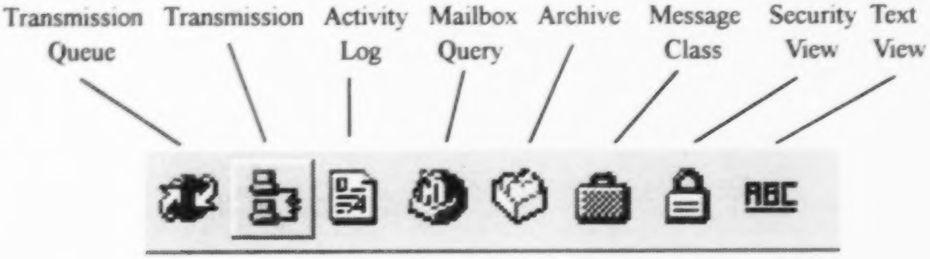

Cut
Copy
Paste
Find

The toolbar buttons below perform basic functions that are also available in the Record menu. Use these buttons anytime you are scrolling through a table. To delete any record, highlight the desired record, then click the button.

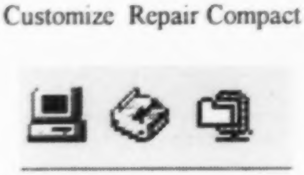

First Record
Previous Record
Next Record
Last Record
Delete

31

The toolbar buttons below perform basic functions that are also available in the File and Transmission menus.


Transmission Queue
Transmission
Activity Log
Mailbox Query
Archive
Message Class
Security View
Text View
ABC

The toolbar buttons below perform basic functions that are also available in the Tools menu. Use Customize to modify the appearance of the toolbar or other settings to your preference. Repair and Compact are used fix the database used by EDconn32.


Customize
Repair
Compact

Appendix D

Print Reports

```
Report Date: 08/29/2000        U.S. DEPARTMENT OF EDUCATION                     PAGE:  1
Report Time:   16:11:59            EDEXPRESS - 2000-2001
                             ENTERED APPLICATION RECORDS LIST
                                    DEPENDENCY STATUS
        THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
******************************************************************************************
                 FIRST     MI  EST.      SOCIAL   STAT    ADD     APP         ERROR
LAST NAME        NAME          EFC    SECURITY NO CODE    DATE    TYPE        CODES
---------------- --------- -- ------- ----------- ---- ---------- ---- -------------------
ALBERTS          ALBERT         17172 001-48-8578  B   08/02/2000  I
CARLSON          CARL      C     1269 002-38-1474  B   08/02/2000  I
SMITH            JON       M       35 999-99-9998  B   12/27/1999  I
JACKSON          JONATHAN  M       35 999-99-9999  B   08/29/2000  I

                                                                    Totals:             4
```

```
FAA Estimated Need Analysis                     Student ID: 999999999JA00
Student's Name: JACKSON,JONATHAN M.             Date Calculated: 08/29/2000

Calculated Values
=================
Dependency Status (Calc.)   D      Prim Month 1      35     Sec Month 1
Formula Type                1      Prim Month 2      35     Sec Month 2
Primary EFC                35      Prim Month 3      35     Sec Month 3
Secondary EFC                      Prim Month 4      35     Sec Month 4
Paid EFC Type                      Prim Month 5      35     Sec Month 5
Reject Reason                      Prim Month 6      35     Sec Month 6
                                   Prim Month 7      35     Sec Month 7
                                   Prim Month 8      35     Sec Month 8
                                   Prim Month 9             Sec Month 9
                                   Prim Month 10     35     Sec Month 10
                                   Prim Month 11     35     Sec Month 11
                                   Prim Month 12     35     Sec Month 12


Total Income                      27500    FISAP Total Income              28520
Allowance Against Total Inc.      60069    Asset Protection Allowance      44400
State Tax Allowance                1925    Par Contribution from Assets        0
Employment Allowance               2800    Adjusted Available Income      -32569
Student Total Income               1020    Total Parent Contribution           0
Income Protection Allowance       53240    Total Student Contribution
Available Income                 -32569    Adjusted Par Contribution           0
Cont From Avail Income                     Stud Income Contribution            0
Discretionary Net Worth          -44100    Stud Asset Contribution            35


Assumed Values
==============
Stud Citizenship Status                 Par Marital Status
Stud Marital Status                     Par Number of Family Members
Stud Born before 1-1-77?                Par Num. in College in 2000-2001
Stud Are You Married?                   Par Adjusted Gross Income
Stud Number of Family Members           Par U.S. Income Tax Paid               0
Stud Num. in College in 2000-2001       Par Earned Income Credit
Stud Adjusted Gross Income              Father's Income from Work
Stud U.S. Income Tax Paid               Mother's Income from Work
Stud Earned Income Credit               Par Amount from Worksheet A
Stud Income from Work                   Par Amount from Worksheet B
Spouse Income from Work
Stud Amount from Worksheet A
Stud Amount from Worksheet B
```

```
Report Date: 01/17/2000   U.S. DEPARTMENT OF EDUCATION                PAGE:  1
Report Time:    11:17:56       EDEXPRESS - 2000-2001
            IMPORT RECORDS EDIT REPORT - ISIR Data - Electronic Apps
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
********************************************************************************
Batch ID: #A10010012000071408273 3

Student SSN  Trans/Name ID  Student Name                   Not Matched  Skipped

-------------------------------------------------------------------------------



Total Records Accepted:        5
Total Records in Error:        0
Total Records Skipped:         0
Total Records in Batch:        5
```

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Report Date: 01/17/2000  U.S. DEPARTMENT OF EDUCATION                PAGE:  1
Report Time:   11:21:14       EDEXPRESS - 2000-2001
               IMPORT RECORDS EDIT REPORT - ISIR Data - Automatic
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
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Batch ID: #E10010012000072816O817

Student SSN  Trans/Name ID  Student Name                   Not Matched  Skipped

-------------------------------------------------------------------------------



Total Records Accepted:        15
Total Records in Error:        0
Total Records Skipped:         0
Total Records in Batch:        15
```

2000-2001 Institutional Student Information Record

OMB Number: 1845-0008

Student ID	999-76-4778 MA 10

STEP ONE (THE STUDENT) (Q1-Q36)

Name	MARY O. MARLOW
Address:	54034 SARCAHITA AVENUE# NORTH OLDTOWN FM 99059
Social Security Number	999-76-4778
Date of Birth	10/14/1980
Permanent Home Phone #	(555)555-6820
Have Driver's License?	NO
Driver's Lic	
Citizenship Sts	ELIGIBLE NONCITIZEN
Alien Registration Number	A999428574
Marital Status	MARRIED
Date of Marital Status	08/1998
Enrollment Sts Summ 2000	NOT ATTEND
Enrollment Sts Fall 2000	NOT ATTEND
Enrollment Sts Wint 2000-2001	FULL TIME
Enrollment Sts Spr 2001	FULL TIME#
Enrollment Sts Summ 2001	FULL TIME
Father's Educational Level	
Mother's Educational Level	
State of Legal Residence	FM
Legal Resident before 1-1-1995?	YES
Date of Legal Res.	10/1995
Drug Conviction Elig?	Eligible
Are You Male?	NO
Register for Selective Service?	
Degree/Cert	2nd BA#
Yr in Coll 2000-2001	2nd YR/SOPH
Have HS Diploma/GED?	NO
Bachelor's Degree by 7-1-2000?	NO
Interested in Student Loans?	NO
Interested in Work Study?	NO

STEP TWO (STUDENT & SPOUSE) (Q37-Q53)

1999 Tax Form Filed Status	FILED
Type of 1999 Tax Form Used	1040
Eligible to File 1040A or 1040EZ?	
Student and Spouse 1999 AGI	89980
Student and Spouse 1999 Tax	0
Student and Spouse 1999 Exemptions	05
Earned Income Credit	3556
Student's Income from Work	74700
Spouse's Income from Work	16000
Amt from Worksheet A	
Amt from Worksheet B	

EFC	
Dependency Status	I
Cash, Savings, and Checking	
Net Worth of Investments	
Net Worth of Business	
Net Worth of Investment Farm	
No. of Months VA Benefits Received	
Amount Per Month of VA Benefits	0

STEP THREE (THE STUDENT) (Q54 - Q59)

Born Before 1-1-1977?	NO
Working on Degree Beyond Bachelors?	NO
Are you Married?	YES
Dependents Other Than Spouse?	YES#
Orphan or Ward of the Court	NO
Veteran of U.S. Armed Forces	NO

STEP FOUR (PARENTS) (Q60 - Q85)

Marital Status	
Father's SSN	
Father's Last Name	
Mother's SSN	
Mother's Last Name	
Number in Household	
Number in College in 2000-2001	
State of Legal Residence	
Legal Residents before 1-1-1995?	
Date of Legal Res.	
Age of Older Parent	
1999 Tax Form Filed Status	
Type of 1999 Tax Form Used	
Eligible to File 1040A or 1040EZ?	
Parent's 1999 AGI	
Parent's 1999 Tax	
Parent's 1999 Exemptions	
Earned Income Credit	
Father's Income from Work	
Mother's Income from Work	
Amt from Worksheet A	
Amt from Worksheet B	
Cash, Savings, and Checking	
Net Worth of Investments	
Net Worth of Business	
Net Worth of Investment Farm	

STEP FIVE (STUDENT HH) (Q86 - Q87)

Number in Household	05
Number in College in 2000-2001	1

*=assumption h=highlight flag #=history correction

```
                2000-2001 Institutional Student Information Record

 Student ID              999-76-4778 MA 10     EFC
 Last Name                          MARLOW
 STEP 6 (Q88-Q99)
 College 1  001001   House 1     W/PARENT(S)
 College 2           House 2
 College 3           House 3
 College 4           House 4                   OFFICE INFORMATION
 College 5           House 5                   DRN                                  9118
 College 6           House 6                   Primary EFC Type
                                               Secondary EFC Type
 STEP 7 (Q100-Q104)                            Processed Date                 07/16/2000
 Date Application Completed     01/27/2000     Application Source          ELECTRONICAPP
 Signed By                       APPLICANT     ISIR Transaction Type    ELEC. HIST. CORR.
 Preparer's SSN                                Institution Number                 001001
 Preparer's EIN                                Reject Override Codes:
 Preparer's Signature                          B   N   W
                                               Assumption Override Codes:
                                               1:   2:   3:   4:   5:   6:
-----------------------------------------------------------------------------------------
 FAA INFORMATION                               Early Analysis Flag
 Date ISIR Received             01/17/2000     Rejects Met:                            1
 Verification Flag                       N
 System Generated Indicator                    Dependency Override
 FAA Adjustment                                Duplicate Request
 Date Application Received      07/16/2000     Correction # Applied to                01
 Reprocessing Code                             Transaction Receipt Date       02/04/2000
 Processed Record Type                         Input Record Type

Pell Paid EFC              Pell Elig Flag         Y              Intermediate Values
Primary EFC                Secondary EFC                         TI         FTI
Mon 1       Mon 7          Mon 1       Mon 7                     ATI        APA
Mon 2       Mon 8          Mon 2       Mon 8                     STX        PCA
Mon 3       Mon 10         Mon 3       Mon 10                    EA         AAI
Mon 4       Mon 11         Mon 4       Mon 11                    STI        TPC
Mon 5       Mon 12         Mon 5       Mon 12                    IPA        TSC
Mon 6                      Mon 6                                 AI         PC
                                                                 CAI        SIC
                                                                 DNW        SCA
Auto Zero EFC Flag
SNT Flag                 NO                                      Subsequent App Flag

Match Flags: SSN 4  SSA A  INS     PRI     SS     NSLDS 1  VA
             INS Ver. No.                        SS Registration Flag
             NSLDS Transaction Number   10       NSLDS Database Results Flag  1

Comments:   006,149,170,143,137
```

2000-2001 Institutional Student Information Record

OMB Number: 1845-0008

Student ID	999-58-4752 KO 01

STEP ONE (THE STUDENT) (Q1-Q36)

Name	KERRY A. KOBLES
Address:	483 STARDMORE AVE. #252 METROPOLITAN FC 99019
Social Security Number	999-58-4752
Date of Birth	06/26/1963
Permanent Home Phone #	(555)555-5847
Have Driver's License?	YES
Driver's Lic	A9937479-FC
Citizenship Sts	ELIGIBLE NONCITIZEN
Alien Registration Number	A999058050
Marital Status	UNMARRIED
Date of Marital Status	
Enrollment Sts Summ 2000	FULL TIME
Enrollment Sts Fall 2000	1/2 TIME
Enrollment Sts Wint 2000-2001	NOT ATTEND
Enrollment Sts Spr 2001	NOT ATTEND
Enrollment Sts Summ 2001	NOT ATTEND
Father's Educational Level	HIGH SCHOOL
Mother's Educational Level	COLLEGE
State of Legal Residence	FC
Legal Resident before 1-1-1995?	YES
Date of Legal Res.	05/1993
Drug Conviction Elig?	Eligible
Are You Male?	NO
Register for Selective Service?	
Degree/Cert	ASSOCTECH
Yr in Coll 2000-2001	1st YR ATT PREV
Have HS Diploma/GED?	NO
Bachelor's Degree by 7-1-2000?	NO
Interested in Student Loans?	NO
Interested in Work Study?	NO

STEP TWO (STUDENT & SPOUSE) (Q37-Q53)

1999 Tax Form Filed Status	WILLFILE
Type of 1999 Tax Form Used	TERRITORY
Eligible to File 1040A or 1040EZ?	
hStudent and Spouse 1999 AGI	177450
Student and Spouse 1999 Tax	1676
Student and Spouse 1999 Exemptions	01
Earned Income Credit	0
Student's Income from Work	177450
Spouse's Income from Work	0
Amt from Worksheet A	0
Amt from Worksheet B	0

EFC	1366
Dependency Status	I
Cash, Savings, and Checking	500
Net Worth of Investments	0
Net Worth of Business	0
Net Worth of Investment Farm	0
No. of Months VA Benefits Received	0
Amount Per Month of VA Benefits	

STEP THREE (THE STUDENT) (Q54 - Q59)

*Born Before 1-1-1977?	YES
Working on Degree Beyond Bachelors?	NO
Are you Married?	NO
Dependents Other Than Spouse?	YES
Orphan or Ward of the Court	NO
Veteran of U.S. Armed Forces	NO

STEP FOUR (PARENTS) (Q60 - Q85)

Marital Status	
Father's SSN	
Father's Last Name	
Mother's SSN	
Mother's Last Name	
Number in Household	
Number in College in 2000-2001	
State of Legal Residence	
Legal Residents before 1-1-1995?	
Date of Legal Res.	
Age of Older Parent	
1999 Tax Form Filed Status	
Type of 1999 Tax Form Used	
Eligible to File 1040A or 1040EZ?	
Parent's 1999 AGI	
Parent's 1999 Tax	
Parent's 1999 Exemptions	
Earned Income Credit	
Father's Income from Work	
Mother's Income from Work	
Amt from Worksheet A	
Amt from Worksheet B	
Cash, Savings, and Checking	
Net Worth of Investments	
Net Worth of Business	
Net Worth of Investment Farm	

STEP FIVE (STUDENT HH) (Q86 - Q87)

Number in Household	02
Number in College in 2000-2001	1

*=assumption h=highlight flag #=history correction

2000-2001 Institutional Student Information Record

```
Student ID               999-58-4752 KO 01    EFC                             1366
Last Name                           KOBLES
STEP 6 (Q88-Q99)
College 1  001001  House 1        ONCAMPUS
College 2          House 2
College 3          House 3
College 4          House 4                    OFFICE INFORMATION
College 5          House 5                    DRN                               9366
College 6          House 6                    Primary EFC Type                     2
                                              Secondary EFC Type
STEP 7 (Q100-Q104)                            Processed Date              10/24/2000
Date Application Completed      08/20/2000    Application Source         ELECTRONICAPP
Signed By                        APPLICANT    ISIR Transaction Type   ELEC. HIST. CORR.
Preparer's SSN                                Institution Number              001001
Preparer's EIN                                Reject Override Codes:
Preparer's Signature                          B   N   W
                                              Assumption Override Codes:
                                              1:   2:   3:   4:   5:   6:
----------------------------------------------------------------------------------
FAA INFORMATION                               Early Analysis Flag
Date ISIR Received              01/17/2000    Rejects Met:                     17,70
Verification Flag                        N
System Generated Indicator                    Dependency Override
FAA Adjustment                                Duplicate Request
Date Application Received       10/24/2000    Correction # Applied to
Reprocessing Code                             Transaction Receipt Date    08/20/2000
Processed Record Type                         Input Record Type

Pell Paid EFC      PRIMARY  Pell Elig Flag           Y        Intermediate Values
Primary EFC           1366  Secondary EFC                     TI     80500 FTI        0
Mon 1    152 Mon 7    1064  Mon 1       Mon 7                 ATI     5319 APA        0
Mon 2    304 Mon 8    1216  Mon 2       Mon 8                 STX     4030 PCA
Mon 3    456 Mon 10   1520  Mon 3       Mon 10                EA         0 AAI
Mon 4    608 Mon 11   1672  Mon 4       Mon 11                STI        0 TPC
Mon 5    760 Mon 12   1824  Mon 5       Mon 12                IPA     3000 TSC
Mon 6    912                Mon 6                             AI     27310 PC         0
                                                              CAI    13660 SIC
                                                              DNW        0 SCA        0
Auto Zero EFC Flag
SNT Flag               NO                                     Subsequent App Flag

Match Flags: SSN 4  SSA    INS    PRI    SS Y  NSLDS 1  VA
             INS Ver. No.                     SS Registration Flag
             NSLDS Transaction Number    1    NSLDS Database Results Flag  1

Comments:  006,149,118,146,144,171
```

321

*=assumption h=highlight flag #=history correction

2000-2001 Institutional Student Information Record

OMB Number: 1845-0008

Student ID	999-70-1713 TU 01

STEP ONE (THE STUDENT) (Q1-Q36)

Name	TERRENCE O. TUBSEY
Address:	50453 BLUE MEADOW LANE BACKYARD PARK IN 99029
hSocial Security Number	999-70-1713
Date of Birth	08/04/1951
Permanent Home Phone #	(555)555-0917
Have Driver's License?	YES
Driver's Lic	N9964853-IN
Citizenship Sts	U.S. Citizen
Alien Registration Number	A
Marital Status	MARRIED
Date of Marital Status	08/1995
Enrollment Sts Summ 2000	
Enrollment Sts Fall 2000	FULL TIME
Enrollment Sts Wint 2000-2001	
Enrollment Sts Spr 2001	
Enrollment Sts Summ 2001	
Father's Educational Level	
Mother's Educational Level	
State of Legal Residence	IN
Legal Resident before 1-1-1995?	YES
Date of Legal Res.	06/1976
Drug Conviction Elig?	Eligible
Are You Male?	YES
Register for Selective Service?	
Degree/Cert	ASSOCTECH
Yr in Coll 2000-2001	2nd YR/SOPH
Have HS Diploma/GED?	NO
Bachelor's Degree by 7-1-2000?	NO
Interested in Student Loans?	YES
Interested in Work Study?	YES

STEP TWO (STUDENT & SPOUSE) (Q37-Q53)

1999 Tax Form Filed Status	WILLFILE
Type of 1999 Tax Form Used	1040
Eligible to File 1040A or 1040EZ?	
Student and Spouse 1999 AGI	186980
Student and Spouse 1999 Tax	1405
Student and Spouse 1999 Exemptions	02
Earned Income Credit	0
Student's Income from Work	67130
Spouse's Income from Work	88400
Amt from Worksheet A	0
Amt from Worksheet B	0

EFC	
Dependency Status	X
Cash, Savings, and Checking	0
Net Worth of Investments	0
Net Worth of Business	0
Net Worth of Investment Farm	0
No. of Months VA Benefits Received	0
hAmount Per Month of VA Benefits	0

STEP THREE (THE STUDENT) (Q54 - Q59)

hBorn Before 1-1-1977?	YES
hWorking on Degree Beyond Bachelors?	NO
hAre you Married?	YES
Dependents Other Than Spouse?	NO
Orphan or Ward of the Court	NO
Veteran of U.S. Armed Forces	YES

STEP FOUR (PARENTS) (Q60 - Q85)

Marital Status	
Father's SSN	961-70-1713
Father's Last Name	TUBSEY
Mother's SSN	861-70-1713
Mother's Last Name	TUBSEY
Number in Household	
Number in College in 2000-2001	
State of Legal Residence	IN
hLegal Residents before 1-1-1995?	
Date of Legal Res.	
Age of Older Parent	50
1999 Tax Form Filed Status	WILLFILE
Type of 1999 Tax Form Used	1040
Eligible to File 1040A or 1040EZ?	
Parent's 1999 AGI	
*Parent's 1999 Tax	0
hParent's 1999 Exemptions	
hEarned Income Credit	
hFather's Income from Work	
hMother's Income from Work	
hAmt from Worksheet A	0
hAmt from Worksheet B	
hCash, Savings, and Checking	0
hNet Worth of Investments	0
hNet Worth of Business	0
hNet Worth of Investment Farm	0

STEP FIVE (STUDENT HH) (Q86 - Q87)

hNumber in Household	02
hNumber in College in 2000-2001	2

*=assumption h=highlight flag #=history correction

2000-2001 Institutional Student Information Record

Student ID	999-70-1713 TU 01	EFC	
Last Name	TUBSEY		

STEP 6 (Q88-Q99)

hCollege 1	001001	hHouse 1	ONCAMPUS
hCollege 2		hHouse 2	
College 3		House 3	
College 4		House 4	
College 5		House 5	
College 6		House 6	

STEP 7 (Q100-Q104)

Date Application Completed	02/20/2000
Signed By	
Preparer's SSN	
Preparer's EIN	
Preparer's Signature	

OFFICE INFORMATION

DRN	
Primary EFC Type	
Secondary EFC Type	
Processed Date	03/05/2001
Application Source	ELECTRONICAPP
ISIR Transaction Type	ELEC. HIST. CORR.
Institution Number	001001

Reject Override Codes:
B N W
Assumption Override Codes:
1: 2: 3: 4: 5: 6:

FAA INFORMATION

Date ISIR Received	01/17/2000
Verification Flag	N
System Generated Indicator	
FAA Adjustment	
Date Application Received	03/05/2001
Reprocessing Code	
Processed Record Type	

Early Analysis Flag	
Rejects Met:	1 ,18
Dependency Override	
Duplicate Request	
Correction # Applied to	
Transaction Receipt Date	02/24/2000
Input Record Type	

Pell Paid EFC
Primary EFC

Mon 1	Mon 7
Mon 2	Mon 8
Mon 3	Mon 10
Mon 4	Mon 11
Mon 5	Mon 12
Mon 6	

Pell Elig Flag Y
Secondary EFC

Mon 1	Mon 7
Mon 2	Mon 8
Mon 3	Mon 10
Mon 4	Mon 11
Mon 5	Mon 12
Mon 6	

Intermediate Values

TI	0	FTI	0
ATI	0	APA	0
STX	0	PCA	0
EA	0	AAI	0
STI	0	TPC	0
IPA	0	TSC	0
AI	0	PC	0
CAI	0	SIC	0
DNW	0	SCA	0

Auto Zero EFC Flag
SNT Flag NO

Subsequent App Flag

Match Flags: SSN 1 SSA N INS PRI SS NSLDS 1 VA
INS Ver. No. SS Registration Flag
NSLDS Transaction Number 4 NSLDS Database Results Flag 1

Comments: 172,006,149,118,095,029

*=assumption h=highlight flag #=history correction

```
FAA Estimated Need Analysis                   Student ID: 999764778MA10
Student's Name: MARLOW,MARY O.                Date Calculated: 01/17/2000

Calculated Values
=================
Dependency Status (Calc.)   I      Prim Month 1    2654     Sec Month 1
Formula Type                3      Prim Month 2    5308     Sec Month 2
Primary EFC             23888      Prim Month 3    7962     Sec Month 3
Secondary EFC                      Prim Month 4   10616     Sec Month 4
Paid EFC Type                      Prim Month 5   13270     Sec Month 5
Reject Reason                      Prim Month 6   15924     Sec Month 6
                                   Prim Month 7   18578     Sec Month 7
                                   Prim Month 8   21232     Sec Month 8
                                   Prim Month 9             Sec Month 9
                                   Prim Month 10  23888     Sec Month 10
                                   Prim Month 11  23888     Sec Month 11
                                   Prim Month 12  23888     Sec Month 12


Total Income                    93536         FISAP Total Income            93536
Allowance Against Total Inc.    34994         Asset Protection Allowance        0
State Tax Allowance              2806         Par Contribution from Assets
Employment Allowance             2800         Adjusted Available Income     60366
Student Total Income                          Total Parent Contribution
Income Protection Allowance     22580         Total Student Contribution    23888
Available Income                58542         Adjusted Par Contribution
Cont From Avail Income                        Stud Income Contribution
Discretionary Net Worth         15200         Stud Asset Contribution        1824

Assumed Values
==============
Stud Citizenship Status                    Par Marital Status
Stud Marital Status                        Par Number of Family Members
Stud Born before 1-1-77?                   Par Num. in College in 2000-2001
Stud Are You Married?                      Par Adjusted Gross Income
Stud Number of Family Members              Par U.S. Income Tax Paid
Stud Num. in College in 2000-2001          Par Earned Income Credit
Stud Adjusted Gross Income                 Father's Income from Work
Stud U.S. Income Tax Paid                  Mother's Income from Work
Stud Earned Income Credit                  Par Amount from Worksheet A
Stud Income from Work                      Par Amount from Worksheet B
Spouse Income from Work
Stud Amount from Worksheet A
Stud Amount from Worksheet B
```

```
Report Date: 01/17/2000   U.S. DEPARTMENT OF EDUCATION               PAGE:  1
Report Time:    15:15:25       EDEXPRESS - 2000-2001
                        ENTERED CORRECTION RECORDS LIST
*******************************************************************************
  SOCIAL     NAME TRAN STAT        LAST            ADD      SAR FIELDS   CORRECTED
SECURITY NO CODE  #   CODE         NAME            DATE      CORRECTED     VALUE
----------- ---- ---- ---- --------------- ---------- ---------- ---------------
999-58-4752  KO   01   B   KOBLES          01/17/2000 041        16760
                                                      042        02

999-72-7499  FO   01   B   FOGELMAN        01/17/2000 040        005890

999-72-7499  FO   02   B   FOGELMAN        01/17/2000 092        001001
                                                      114        4681

999-76-4778  MA   10   B   MARLOW          01/17/2000 048        005200
                                                      049        010000
                                                      050        000000
                                                      051        000000

                                                           Totals:            4
```

```
Report Date: 01/17/2000   U.S. DEPARTMENT OF EDUCATION             PAGE:  1
Report Time:   12:29:49       EDEXPRESS - 2000-2001
                           DETAIL RECORDS ERROR LIST
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
********************************************************************************
CORRECTIONS
BATCH ID: #C000122419990101111111

   SOCIAL       NAME  TRANS  SAR
SECURITY NO.    CODE    #     #     MESSAGE
-------------   ----  -----  ----   -------------------------

010-20-3040       RA     02    040  NOT FOUND ON DATABASE                                   T


Total Records Accepted:        0
Total Records in Error:        5
Total Records Skipped:         0
Total Records in Batch:        5
```

```
Report Date: 01/17/2000     U.S. DEPARTMENT OF EDUCATION                      PAGE:  1
Report Time:   15:20:48         EDEXPRESS - 2000-2001
                               PROCESSED RECORDS LIST
      THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*****************************************************************************************
LAST NAME          FIRST      MI   SOCIAL        TRANS  PROCESSED    TRANS
                   NAME           SECURITY NO      #      DATE       TYPE    EFC    VER
----------------   ---------  --  -----------   -----  ----------   -----  ------  ---
QUIMATO            QUINN      Q   999-46-2885    05    01/15/2001     1     133     N
COMMENT CODES: 006,149,118,146,029,137


RALJON             REGINA     R   999-46-6218    01    01/15/2001     1    2,604    Y
COMMENT CODES: 006,050,069,072,143,033,140


JOSEPHS            JOSEPHINE      999-48-8196    02    09/22/2000     1             Y
COMMENT CODES: 006,112,117,118,143,140


NEDORU             NANCY          999-56-1013    01    03/18/2001     2    99,999   Y
COMMENT CODES: 006,050,099,137


KOBLES             KERRY      A   999-58-4752    01    10/24/2000     2    1,366    N
COMMENT CODES: 006,149,118,146,144,171


OPENHEIMER         ORLANDO        999-62-3133    01    06/27/2000     0      0      N
COMMENT CODES: 006,047,157,016,029,140


LUCENS             LARRY      O   999-62-6852    01    06/13/2000     1    37,284   N
COMMENT CODES: 006,050,143,033,137


TUBSEY             TERRENCE   O   999-70-1713    01    03/05/2001     2             N
COMMENT CODES: 172,006,149,118,095,029


FOGELMAN           FARAH      L   999-72-7499    01    07/18/2000     0    1,033    Y
COMMENT CODES: 006,149,061,062,030,140


PAULMER            PAUL       O   999-74-9680    01    08/08/2000     2      0      N
COMMENT CODES: 006,149,161,143,137


SOPRANOE           SOPHIE     O   999-76-2634    01    03/19/2000     1    5,465    N
COMMENT CODES: 006,149,029,137


MARLOW             MARY       O   999-76-4778    10    07/16/2000     2             N
COMMENT CODES: 006,149,170,143,137


GRANT              GRANT          999-84-6590    05    08/19/2000     1      0      Y
COMMENT CODES: 006,149,143,137
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                   NAME             SECURITY NO     #      DATE      TYPE    EFC    VER
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HUSTON             HUBERT           999-96-3950    01    10/02/2000    2    9,522    N
COMMENT CODES: 006,149,117,118,029,140


IRLANDO            IRVING           999-96-3951    01    10/02/2000    2      0      N
COMMENT CODES: 006,050,072,029,137

                                                                 Totals: 15
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                    NAME           SECURITY NO     #       DATE      TYPE    EFC     VER
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QUIMATO             QUINN      Q   999-46-2885     06    01/15/2001    1     133      N
COMMENT CODES: 006,149,118,146,029,137


RALJON              REGINA     R   999-46-6218     05    01/15/2001    1    2,604     Y
COMMENT CODES: 006,050,069,072,143,033,140


TUBSEY              TERRENCE   O   999-70-1713     02    03/05/2001    2              N
COMMENT CODES: 172,006,149,118,095,029


FOGELMAN            FARAH      L   999-72-7499     02    07/18/2000    0    1,033     Y
COMMENT CODES: 006,149,061,062,030,140


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LAST NAME          FIRST      MI    SOCIAL       TRANS  PROCESSED   TRANS
                   NAME            SECURITY NO     #      DATE      TYPE    EFC    VER
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JOSEPHS            JOSEPHINE        999-48-8196    02   09/22/2000    1             Y
COMMENT CODES: 006,112,117,118,143,140


KOBLES             KERRY       A    999-58-4752    01   10/24/2000    2     1,366   N
COMMENT CODES: 006,149,118,146,144,171


LUCENS             LARRY       O    999-62-6852    01   06/13/2000    1    37,284   N
COMMENT CODES: 006,050,143,033,137


FOGELMAN           FARAH       L    999-72-7499    01   07/18/2000    0     1,033   Y
COMMENT CODES: 006,149,061,062,030,140


MARLOW             MARY        O    999-76-4778    10   07/16/2000    2             N
COMMENT CODES: 006,149,170,143,137


GRANT              GRANT            999-84-6590    05   08/19/2000    1       0     Y
COMMENT CODES: 006,149,143,137


HUSTON             HUBERT           999-96-3950    01   10/02/2000    2     9,522   N
COMMENT CODES: 006,149,117,118,029,140


IRLANDO            IRVING           999-96-3951    01   10/02/2000    2       0     N
COMMENT CODES: 006,050,072,029,137


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